

President's Annual Report

Submitted by Clark Aldridge, SASFAA President

As I look back over the past year, I am reminded of what an incredible experience it has been for me. It has been a lot of work, and at times stressful, but an opportunity to work with and get to know many wonderful people. I remember all the volunteers who devoted countless evenings and weekends on activities for our association for the benefit of their colleagues. Whether they worked a registration desk, presented an interest session at a conference, served as instructor at the New Aid Officer Workshop, planned a menu, or proof read a document, they are all important to SASFAA. I am reminded of Guy Gibbs, Randy Craig, Susan Little and Bill Wall who traveled to Northern Virginia shortly after September 11, when many of us were fearful of flying, to work on our by-laws and the policy and procedures manual. I recall the great efforts of the KASFAA Local Arrangements Committee to make our annual conference successful.

It was a pleasure to visit our states and meet many SASFAA members who have not had the opportunity to attend the annual conference. Attending the New Aid Officer Workshop and meeting the professional staff was an impressive experience. And, representing SASFAA on the NASFAA Board of Directors has been my privilege.

As this year closes, I thank all SASFAA members for the rewarding opportunity to serve our organization.

Sincerely,

Clark Aldridge

President

2001-2002 SASFAA Annual Report

The year began with an elected officers retreat where the 2001-2002 officers were able to get some great advice and insight from last year's counterpart.

Like other SASFAA presidents, I established a number of goals for the year. Some were new initiatives, while others were continuations or enhancements of goals of previous presidents. Those goals included:

- Providing enhanced communications between our SASFAA committees and our membership.
- Increasing the number of SASFAA members.
- Completing our transition to a web-based newsletter.
- Providing the membership with up-to-date information on legislative issues that impact our members and our institutions.
- Providing enhanced training activities for our mid-level aid officers.
- Providing diversity leadership training opportunities.

Thanks to the hard work of our elected officers, our committee chairs and their committee members, we made progress toward accomplishing these goals.

State Agency

Ken Player assumed the chair of the State Agency Committee subsequent to the retirement of Londa Wolanin. During the past year, this committee provided information to the Board concerning the activities and accomplishments of the loan and grant agencies in the nine SASFAA states.

Some of the main agency issues during the past year were:

- The successful solution to the FFELP interest rate problem.
- The Neg Reg session from a guaranty agency perspective.
- The continuing emphasis by guaranty agencies on default prevention, and the resulting lower cohort default rates.
- The effect of state budget cuts on state grant programs.
- The ability of guaranty agencies to use the “New Hires” database for skip tracing defaulted borrows.
- The emphasis by agencies on e-commerce activities such as e-signatures and on-line loan applications.

Archive and Research Committee

Ellen Green, chair of the Achieve and Research Committee, worked closely with Marsha King and the South Carolina Student Loan Corporation to image our archived files. The archived files have been sorted by year and copied to computer disks in a TIF format. This format allows for the easy access, retrieval and web interface of all archived information.

Virtual Image Technology offers data retrieval and web interface solutions that SASFAA may wish to explore in the future.

The 2002-2003 committee will need to look into how SASFAA wishes to retrieve the archived information and who would be eligible to retrieve the information. VIT can assist with getting archived records on our web site for use of the general association or specific groups.

Conference Committee

Our Conference Committee, chaired by Lisa Tumer, put together a conference that featured a variety of interest sessions (over 60) clustered into four tracks. The tracks included:

- New Aid Officer’s Track
- Technology Track
- Management Track
- Professional Development Track

A review of the conference evaluations revealed that the conference was a huge success and met the expectations of the 699 attendees. The respondents revealed overwhelmingly that the conference “met their professional needs and expectations” with a 98% approval rating.

The speaker for the opening session was Dr. Robert C. Khayat, Chancellor of the University of Mississippi. Dr. Khayat gave an excellent presentation on the aid administrator’s role in ensuring access to education for all students. He stated that financial aid administrators open doors for students and contribute to their successes in life. He challenged us to continue to find ways to educate students through our profession and reminded us that our reward is the success of our students.

On Monday morning, the keynote speaker was Mauricio Velasquez, President of The Diversity Training Group. He did an outstanding presentation on diversity, entitled “What You Don’t Know, You Don’t Know”. It sounds

confusing, but by the end of the presentation, we all knew what we did not know.

Tuesday morning, Jeff Baker, Director of Program Development Division of the U.S. Department of Education, provided us with a federal update. As always, it was very informative.

During the banquet, we were pleased to have SASFAA's own Cruzita (Crusie) Lucero, NASFAA National Chair, address the attendees. Crusie informed us about what was going on at NASFAA, and presented the NASFAA Leadership Award to Susan Little, Director of Financial Aid at the University of Georgia.

SASFAA's community service project this year was Kentucky Harvest, an organization that feeds the hungry in the Louisville area through food donations from many sources. SASFAA raised \$1,117, and presented this donation to the Kentucky Harvest to assist them in their efforts.

Special thanks go to the conference committee members, the local arrangements chair, and the local arrangements committee for all their hard work and dedication to ensure the conference was a success.

Diversity Committee

The Diversity Committee, chaired by Penny Hill, arranged for Mauricio Velasquez, President and founder of The Diversity Training Group, to present a general session at the SASFAA Conference. The title of Mr. Velasquez's presentation was "Diversity Today: What You Don't Know, You Don't Know".

The Diversity Committee recommends that SASFAA continue to support the future diversity activities and continue budgetary support.

Electronic Services Committee

Over the past year, the Electronics Services Committee, chaired by Lester McKenzie, made several enhancements were made to the website. Among the enhancements were a sponsorship page and form to allow the Vendor/Sponsor Chair to move to a completely automated process. Sponsors were able to go online and choose the sponsorship activities that appealed to them and their company and submit it online.

The SASFAA Newsletter was also moved to the web. Thoughts as to how members would read the newsletter were taken into consideration, and a no-graphics printable option was selected. Also considered this year was a way to password protect the newsletter and other web-based products. However, this topic has been deferred to the coming year.

Another significant change for the year was the reliance on the web for conference activities and information. The Electronic Services Committee Chair was added to the Conference Committee as an ex-officio member. Based on the time involved in keeping the website up-to-date and the conference requirements, it is recommended that the duties be split and someone other than the Electronic Services Chair have conference responsibilities.

Maintenance of the list serve was hampered in that our host, Interland, made a decision to get out of the listserve business. Therefore, we lost technical support.

Legislative Relations

This committee, chaired by Karen Fooks and comprised of federal/legislative relations chairs from each of the SASFAA states, drafted two letters to the appropriate Congressional representatives concerning the Pell Grant

maximum and the FY 2002 education budget. The committee also developed and submitted SASFAA's response to the FEG UP initiative.

The committee provided the membership with periodic reports and alerts throughout the year. Additionally, legislative updates were periodically posted to the SASFAA website.

The committee recommends that the incoming president and committee chair choose committee members who are specifically appointed to meet the needs of SASFAA regardless of whether these individuals also serve as the state legislative committee chairs. Also, some consideration should be given as to the need to include a committee member from each state.

Lender Liaison

The Lender Liaison report has contained much valuable information concerning changes that have occurred as well as changes being proposed for the lender community and for students.

Among the current items of interest to the community are:

- On February 8, 2002, President Bush signed into law S.1762 to amend the Higher Education Act of 1965 to establish fixed interest rates for students and parent borrowers, to extend current law with respect to special allowance rates for lenders, and for other purposes.
- The Bush Administration is working to improve cost estimates for the student loan programs in an effort to achieve more accurate and fair cost figures for both the FFELP and Direct Loan programs.
- The President's FY 2003 budget request contains the Department's estimates for loan volume in 2003, showing that overall volume will continue to climb, as consolidation volume will level out after several years of increases.
- The Texas Guarantee Agency has found that community college transfer students have similar default rates to those of other students at colleges to which they transferred.
- SallieMae's e-signature has gone live.
- The Chronicle of Higher Education has reported that the White House had no plans to dismantle the Direct Loan program but would not guarantee that the administration would continue to support the program when the law that authorizes the it expires next year.

Management Institute Committee

At the July 2001 meeting, the SASFAA Executive Board approved plans to hold the next SASFAAA Management Institute in December 2002. The institute is targeted to senior manager in student financial aid offices in the SASFAA Region. The expected attendance at the workshop is 125 to 150. Board members were solicited for site recommendations as well as nominations for committee members.

During the fall, Chair Dave Cecil formed a committee in consultation with President Aldridge and President-Elect Koonce to plan the 2002 Management Institute.

Several prospective sites were identified and initial contact was made with the sites.

In late December 2001, Chair Cecil contacted President Aldridge about his concerns for conducting the workshop in December 2002, and it was decided to take these concerns to the Executive Board.

At its meeting in February 2002, the SASFAA Executive Board decided to postpone the Management Institute until December 2003 due to the following reasons:

- Due to the economic downturn, almost every SASFAA state is experiencing tight state budgets and it seems as if travel budgets are among the first to suffer.
- The poor economy has begun to affect private schools' budgets, as well.
- The slight financial exposure that SASFAA has may be impacted by the addition of the new Mid-Level Workshop.
- NASFAA is holding four Best Practice symposiums across the country this spring.
- While every attempt is made to hold down costs, none of the previous Managements Institutes have broken even.
- We have not signed a hotel contract for December 2002.
- Because all members of the committee were present at the SASFAA conference in Louisville, the first committee was held. Discussion centered on speakers and topics for sessions.

Membership Committee

2001-2002 has been a very busy and very productive year for the SASFAA Membership Committee chaired by Clyde Walker. At the outset of the year, President Aldridge set a goal to increase membership by five percent, or a total of 1,215 members. An integral part of our plan to increase membership was the use of a mass mailing to solicit new and renewal memberships. Such a tool had not been utilized in the previous year, when heavy reliance was placed on "internet" communications in the annual solicitation of members. The Committee thanks the Board for authorizing the funds to cover the printing and mailing costs associated with this endeavor.

The goal of a five percent increase in membership was exceeded. Today the current membership stands at 1,307, an increase of 14.3 percent over 2001.

One of the difficulties this year has been with the laptop computer which SASFAA provides to the Membership Committee Chair - specifically the lack of memory and relatively slow speed at which data can be entered and processed. The Board has supported future committee chairs by authorizing the acquisition of a new laptop computer. A new computer will be purchased prior to the end of the year and delivered to the incoming chair at the transitional meeting in June.

Newsletter

Julia Perreault, Newsletter Editor, has completed the process of converting the newsletter from paper to electronic format beginning with the Winter 2002 issue. There were concerns about whether all SASFAA members would have access to the web version and would take time to read it online. However, the number of visits to the website is tracked and it does appear that the membership is finding their way to the online newsletter.

In addition to changes in the format, lender ads were discontinued in favor of lender logos to be displayed on the newsletter's opening page. Some members expressed concern that sponsorship would decrease as a result of the more limited exposure the logos would provide. Any change requires time for adjustment, and we did note that sponsorship dropped off slightly for the first issue, but has since rebounded.

There are many benefits to making the newsletter available online. It is now in color and much more attractive and readable. The cost of producing and mailing the paper newsletter is money that can be reallocated to other areas by SASFAA. The newsletter can be downloaded and printed if some still prefer a paper format. Additions or corrections can be made online if necessary. Overall, the process has been very successful and membership feedback has been positive. Thanks to all those who contributed to the process over the past two years.

Nominations and Elections

The Nominations and Elections Committee, chaired by Past President Bill Cox, is comprised of the past presidents from each of the nine states. If a state past president is being considered as a candidate for SASFAA office, the state president will designate an alternate to serve on the committee. For this year, this occurred for the state of Alabama, thus Dorenda Adams served on the committee as an alternate from Alabama.

The committee prepared for the Nominations Committee meeting by soliciting names of members interested in serving SASFAA as an elected officer. Multiple names were presented for each office. The committee accomplished the goal of providing a slate with dual nominees for each position representing different states, sectors, and providing minority presence.

The state of officers:

President-Elect	Ron Day, Birmingham Southern College (AL)
	Guy Gibbs, Northern Virginia Community College (VA)
Vice President	Ellen Green, Charleston Southern University (SC)
	Anne Rader, Bryan College (TN)
Secretary	Dee Talley, University of Alabama at Birmingham (AL)
	Donja Tripp, Georgia Southwestern University, (GA)

The committee recommends that future committees consider using conference calls to select a slate of candidates.

Site Selection

The Site Selection Committee, chaired by Ron Gambill, completed work on a new three-year contract with the Don CeSar Hotel for the SASFAA Executive Board transition meeting for 2003,2004 and 2005. By contracting under a three-year contract, SASFAA was able to obtain a consistent room rate for all years. Dates are as follows:

- Thursday, June 5, 2003 - Sunday, June 8, 2003
- Thursday, June 10, 2004 - Sunday, June 13, 2004
- Thursday, June 9, 2005 - Sunday, June 12, 2005

The next project the Committee was to assist with was potential sites for the December 2002 management conference. Contacts were made with hotels for tentative dates and room rates. Due to other events, a decision was made to postpone the conference and all hotels notified to not hold room blocks.

The major focus of the Site Selection Committee was to negotiate a SASFAA Annual Conference site for 2005. Based on the pattern of rotating through all the SASFAA states, the next in sequence is Georgia. The Georgia Association accepted the opportunity and it was determined that Atlanta would have the best facilities considering the size of the conference. Four hotel sites in the Atlanta area were visited and proposals were acquired. The four hotels were the Atlanta Hilton, Hyatt Regency, Waverly-Renaissance and the Westin Peachtree Plaza.

Information was provided to the SASFAA Executive Board by conference call on Thursday April 11, 2002. The Site Selection Chair recommended the Hyatt Regency, Atlanta for 2005 and the Executive Board approved it. The negotiated room rate is \$137 single, double, triple, or quad.

Special Projects

The Special Projects Committee, chaired by Dorenda Adams coordinated the dates and locations of the Decentralized Training Workshops with the presidents of the three participating states (GA, KY, and MS).

The fall NASFAA Training of Trainers Workshop scheduled for Washington, DC was cancelled due to the events of September 11, 2001. This training was accomplished by video conference call to the six instructors (two from each state). Two states, Georgia and Kentucky, participated in the spring Decentralized Training. Three instructors, two from Georgia and one from Kentucky attended the NASFAA Training of Trainers Workshop in Washington, DC. In addition to the Decentralized Training responsibilities, this committee also worked with the new Mid-Level Workshop. In preparation for the workshop, two meetings were held at Millsaps College in Jackson, MS. Invitations were sent to the SASFAA and SWASFAA president's and to our NASFAA National Chair, Crusie Lucero. Instructors for the workshop have been confirmed and arrangements for the printing have been made.

Sponsorship Committee

The Sponsorship Committee, chaired by Ann Hendrick, has surpassed the amount budgeted for the year by over \$25,000.

The 2001-2002 contributions include the following:

	<u>Received</u>	<u>In-kind</u>
20 advertisers in the newsletter	\$ 15,850	
54 sponsor for the annual conference	\$107,955	\$5,385
Board meetings	<u>\$ 5,961</u>	
Total	\$129,766	

New Aid Officer and Mid-Level Workshop support is strong but final numbers are not in at this time.