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## **1997-98 SASFAA Annual Report**

*by Carol Mowbray*

June 8, 1998

SASFAA Colleagues:

Writing the dreadful annual report is finally a thing of the past. I can now look forward to the Transitional Board meeting with tremendous anticipation and a sense of growing satisfaction. The review of the past year's activities has forced me to examine more closely what it was that we actually accomplished.

We have learned a great deal from our meetings and from one another. I look at what we have accomplished with pride in the efforts and hard work of so many individuals. These efforts were given unselfishly and without the thought of reward or compensation. Many have worked simply to make something read with more clarity, work more efficiently or to serve our students and institutions more effectively. We have many talented individuals within our membership and others who are waiting to be discovered.

I have worked hard this year, also, often stretching my days to complete my job-related activities in order to work on association tasks. I have found this year's responsibilities to be wonderful, learning experiences. I have enjoyed getting to know many other SASFAA colleagues better by working with them on a project that we have found to be of mutual interest. I have learned from many.

As I end my presidency and pass the gavel to incoming president Susan Little, I do so with confidence that with your help, she will have a productive and exciting year. It has been a pleasure to have served you as your 1997-98 SASFAA President.

Sincerely,

Carol A. Mowbray  
President

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# 1997-98 Annual Report

*by Carol Mowbray*

Planning the goals and objectives for this 97/98 association year began with a comprehensive review of the recommendations of the Governance and Planning Committee. In addition the SASFAA Long-Range Plan as approved by the SASFAA Board for the five year period 1996-2001 and the suggestions received from the membership, Executive Board and representatives to the Board were considered. A number of goals that were broad in scope were developed, refined and finally adopted by the Board of Directors. These were:

1. To enhance internal and external communications with particular emphasis on electronic communications and linkages which foster increased levels of communications among members.
2. To engage actively in legislative and regulatory advocacy efforts in support of student financial aid programs which benefit students and reduce administrative burden.
3. To provide opportunities for members for professional growth and development through workshops, seminars, meetings, and other training opportunities.
4. To maintain and promote membership development within SASFAA.
5. To implement the procedures of the Association's newly adopted Guide to Financial Management.

In addition to these broad goals which provide direction and continuity in our activities from one year to the next, each Board member, committee chairperson and agency liaison was provided a specific listing of particular objectives to guide them in their efforts during the course of the year. Each of these individuals as well as our membership at large have worked to further the mission of SASFAA. A more detailed description of specific accomplishments is provided later in this report; however the following highlights will illustrate how we have worked toward achieving the goals above.

\* To enhance internal communications, the Policies and Procedures Manual Task Force, established in February 1997, chaired by Bill Wall, Director of Scholarships and Grants, Alabama Commission on Higher Education, completed a review of the existing Policy and Procedure Manual and completely revised and reformatted the document. The new, streamlined publication will lend itself to ease in updating and will be placed on the SASFAA web site for use by all members. In addition to bringing forward and clarifying existing policies and procedures, new sections were developed to describe the duties and responsibilities of officers and committee chairpersons. It is hoped this will be helpful to individuals who may be considering office or wanting to become more involved in the work of the Association.

\* To improve internal and external communications, the communications Committee was reconstituted under the leadership of SASFAA's capable webmaster, Karen Fooks, Director of Financial Aid, University of Florida. Karen has continued to expand the features on the web, including printing a variety of committee forms, encouraging submission of more timely updates of information including a regional calendar of activities, and continuing to give the page a fresh new look. Karen has reported increased activity on the web

site this year. The SASFAA -L listserv also continued to be a useful mechanism to alert members to breaking legislative issues and to send out messages and reminders of upcoming events. The Communication committee also expanded the creation and use of listserves for several SASFAA committees including: conference committee, executive board, legislative relations and the P&P Task Force.

\* In order to facilitate discussion among the state presidents on topical issues taking place within the states as well as to elicit recommendations from the states on how to improve communication and activity within the region and between the state and regional association, the state presidents met prior to each board meeting. Kay Stroud, Associate Director of Financial Aid, Appalachian State University, served as the coordinator of each of these meetings. The meetings were hailed as productive and energizing by state presidents. Time spent in sharing ideas and struggling with perplexing and complicated issues ranged from 2 to 4 hours each meeting. The state presidents found these discussions so worthwhile that they recommended their continuance next year.

\* Opportunities for professional development and training were carried out in several ways. Our 35th Annual Conference held in Nashville, Tennessee was planned by an enthusiastic and representative team of our members under the leadership of Crusie Lucero, Director of Financial Aid, Northeast Technical Community College and was hosted by TASFAA members headed up by TASFAA President Anne Rader. The meeting was quite successful in providing professional development and training opportunities which appealed to our new as well as more experienced members. Ron Gambill, Executive Director, Tennessee Student Assistance Corporation, provided leadership to a hard-working group of local volunteers who were tasked with the logistics and local arrangements in Nashville.

Mary Givhan, SASFAA Vice President and Director of Financial Aid, Mississippi College, located a new site for the New Aid Officers Summer Workshop. This fundamental training program provides broad, comprehensive information for those aid officers with three or fewer years of aid experience. At the same time, Mary began planning for a Management Institute for our more experienced, senior managers. Bill Cox, Curriculum Coordinator, and a seasoned group of instructors are assisting Mary with implementation of the New Aid Officers Workshop. Betty Whalen and Charles Vinson are co-chairs for the Management Institute scheduled for December 11- 13, 1998 in Old Town Alexandria, Virginia.

\* At the outset of the year, it was generally believed that efforts on completing reauthorization activities would take center stage and that we would be discussing implementation issues this spring. However, Congress' agenda was quite different and the pace of events unfolded slowly. We are still wondering when we will have a newly reauthorized Higher Education Act of 1965. As such, the committee's efforts this year, which were also disrupted by a change of leadership, were for the most part focused on defining issues and distributing information via the SASFAA-L listserv. Barry Simmons (Virginia Commonwealth University) chaired the committee and all members struggled admirably during the year with the legislative agenda. The committee assisted with the development of a general session on reauthorization for the conference and participated in a focus group with the U.S. Department of Education on recommendations to the NSLDS.

\* In membership development efforts, Rose Mary Stelma, Director of Financial Aid, East Carolina University, compared existing members by institution with the Title IV code within our region. She sent letters of invitation for membership to non participating institutions. As a result we had a modest increase in membership (47 from his effort alone) for this year. Rose Mary also maintained the membership database accurately and provided updates for the web page. She also was available and responded to members through an e-mail feature established on the web page.

\* This marked the year to test our recently adopted Guide to Financial Management. Ken Player (Executive Vice President, South Carolina Student Loan Corporation) and first-year SASFAA Treasurer Karen Gibson

(edsouth) adhered to the procedures established in the Guide and found them to be very helpful in conducting the financial business of the Association. Ken Player formed an audit subcommittee to review the Association's audit procedures. Purchase of Certificates of Deposit (CDs) were made in keeping with the Association's guidelines. Contracts undertaken on behalf of the members of the Association were reviewed by the President, Treasurer and Budget chairs. The first year of performance has demonstrated the usefulness of the Guide. Greater depth and detail on the scope of activities and services provided to members this year follows.

### **PRESIDENT'S ACTIVITIES:**

As your president this year, I had the opportunity to visit with our states during either a fall or spring conference and provide updates regarding SASFAA activities and services. While there is certainly a cost to the Association for travel to state meetings, the benefit of renewing as well as establishing new relationships is a worthwhile experience. Each state conducts its meetings in a professional manner and engages its participants in timely and interesting professional development and training experiences. It is heartening to see that the primary objective of each meeting is to provide better to service to students. I listened to many heart-warming and enriching experiences this year on rewards of our profession and I was delighted to have the opportunity to be on hand to hear them.

As President of SASFAA, I represent you as a voting member on the NASFAA Executive Council and Board of Directors. In that capacity, this year the Executive Council approved funding to recognize Senator Claiborne Pell for his service to students and in particular for his support of the Federal Pell Grant program, to provide funding to expand the NASFAA web page for public access, and to conclude the contractual arrangement with Mark Kantrowitz and the Financial Aid Information Page.

In the capacity of President, I also attended numerous committee meetings including Conference Committee, Management Institute, Summer New Aid Officer planning, Policies and Procedures Task Force, and Legislative Relations.

I made a concerted effort this year to give every individual who completed a volunteer form an opportunity to be involved in the Association. While this may not have been the individual's first choice, an invitation was extended at some point during the year. It was gratifying to have so many express an interest in participating and I know that Susan has also had strong interest from members in participating during the next year.

### **IMMEDIATE PAST PRESIDENT**

Joel Harrell, Immediate Past President and Director of Financial Aid, University of Tennessee at Chattanooga, continued to serve the Association ably. He chaired three committees: Awards, Nominations and Elections, and Governance and Planning. We had a smoothly run election with an excellent dual slate of candidates for our elections and Joel coordinated and solicited nominees for our Distinguished Service Award.

The Governance and Planning Committee (GAP) will assess and evaluate several outcome measures related to progress in accomplishing the goals and objectives of the Long Range Plan in order to ensure that as an Association we take advantage of opportunities as well as maintain financial stability and vitality.

The recommendations of the GAP committee will be reviewed with the Board of Directors when its report is completed.

The Immediate Past President is a voting, regional member on the SASFAA Board of Directors. In the

capacity as Past President, Joel provides a vital link of continuity from one associational year to the next. This perspective brings valuable insight and context to Board discussions which leads to better decision making and utilization of resources. Joel was instrumental in 1996/97 in leading efforts to develop and write the Guide to Financial Management. This is the first year that the guidelines and procedures were uniformly implemented. Karen Gibson, serving as a first-term Treasurer, and Ken Player, as the new Budget chairperson, have found the Guide to be a helpful tool which has provided them with explicit direction and guidance this year. Joel is to be commended for his foresight in developing this budget and financial management publication designed to address the ongoing financial stability of SASFAA.

## **VICE PRESIDENT and PROFESSIONAL DEVELOPMENT ACTIVITIES**

SASFAA Vice President Mary Givhan (Director of Financial Aid, Mississippi College) developed a one-day workshop for new aid officers offered in conjunction with the annual meeting in February. Working with Bill Cox, Curriculum Coordinator (University of North Carolina at Chapel Hill) and ten instructors from the region, Mary has planned the Summer New Aid Officers Workshop scheduled for June 21 - 26 at the University of South Florida in Tampa. With SASFAA photographer, Christy Scott's (US Bank), help, Mary produced a short video tape illustrating some of the activities and the pace and quality of the workshop. This was distributed to state presidents to be shown during their fall meetings. Betty Whalen (Wingate College, NC) took on the project of updating the Summer Workshop Planning Guide to be included in the Appendices of the new P&P Manual.

The Vice President also began the initial planning and development of the Management Institute which is scheduled for December 11 - 13 in Old Town Alexandria, Virginia. An agenda has been developed; the meeting will occur in the next association fiscal year under the leadership of Bill Cox who has been elected as Vice President for 98/99. Mary also established a listserve for the committee tasked with the implementation of the Management Institute to use to share information, meet deadlines and stay on task.

## **SECRETARY**

Vera Brooks (Spelman College, GA) completes her second year of a two year term of office. She has worked diligently to provide accurate, concise and complete minutes of each of the Board meetings distributing them in a timely manner to the Board of Directors. She has drafted and prepared the agenda for each meeting and ensured that our proceedings were conducted in an organized way. She obtained relevant copies of information for our archivist. As a member of the Policies and Procedures Task Force, Vera researched thoroughly the last ten years of minutes of the Association to ensure that all policies and procedures enacted by the Board of Directors were included in the rewritten Policies and Procedures Manual. She ordered and distributed stationery and a copy of the P&P Manual to all new Board members.

## **PRESIDENT-ELECT**

Susan Little, University of Georgia, has plans well underway to ensure the continuity of SASFAA's major activities for the 1998-99 year. She has shared with me visiting each of the nine states fall or spring meetings during the past year. She has kept a keen eye toward recruitment of new "blood" to fill the ranks of committee chairpersons or committee members. She has solicited membership views on what SASFAA can do to provide better service and to meet critical needs of the membership.

Susan and I began planning last year for an organizational and planning meeting to be held during the June Transitional Board meeting. Indeed plans began before leaving the prior end-of-year meeting. This entailed early identification of her new committee chairpersons and finding the resources to include them in the end-of-

year meeting. We are pleased that this advance planning has resulted in a somewhat new approach to this meeting. The planning meeting will enable us to increase involvement and participation in the development of the goals and objectives for SASFAA as we move into the next year.

Susan has demonstrated a great deal of enthusiasm throughout this year. She has been actively involved in plans for the Management Institute, conducted an Orientation meeting in February with the state presidents'-elect, commenced planning for the 1999 Annual Conference and has solicited volunteers.

This planning year is a crucial one to ensuring the success of SASFAA's endeavors. Susan, always attentive to detail and well-organized, has paved the way to what is sure to be a productive year for SASFAA. I have valued her insights and perspective throughout the year and look forward to assisting her.

## **BUDGET CHAIR AND TREASURER ACTIVITIES**

As stated previously, SASFAA fiscal operations are overseen by Treasurer Karen Gibson (edsouth), and the Budget Committee chairperson, Ken Player (South Carolina Student Loan Corporation). During the June 1997 Transitional Board meeting, Karen, Ken, Joel, Susan Little (President -elect), Ron Gambill (previous Budget chair) and I met to develop the fiscal year budget considering the activities and services to be undertaken by the Association during 1997-98. In developing the budget, we strive for continued fiscal integrity and financial growth, and the prudent use of funds while ensuring that a portion (approximately 50% of our funds relative to our budget) remain in reserve for catastrophic planning.

Throughout the year, adjustments are recommended to the Board by the Budget chair as they are warranted. In addition this year, Ken, Karen and Dave Cecil as Site Selection chair (Transylvania University) reviewed all hotel contracts undertaken by the Association to limit any financial exposure. Ken formed an audit subcommittee to review the Association's audit procedures and conducted a cash and check book audit during the conference. Plans are in place to increase the Association's reserve funds to equal approximately two-thirds of the operating budget. Our operating budget for this fiscal year was \$298,000. Approximately 60% of the budget is targeted on professional development activities including the annual conference. Through May 22, 1998, it appears that we have met our budget plan for membership, while exceeding our projections for sponsorship, advertising, interest earnings and summer workshop participation. With respect to expenditures, we have expended 73% of the total projected expenses through May 22.

We currently have nine CDs comprising our reserve fund of nearly \$180,000 in current value. The amounts range from \$5000 to \$27,000 with maturity dates staggered between 1998 and 2000. Four additional short-term CDs totaling \$100,000 are in a non-reserve fund. The CDs are evaluated as they mature by the Budget committee in light of other potential low risk/ high yield investment strategies. The Budget chair is seeking better avenues to monitoring cash balances in order to keep the maximum amount of funds invested in CDs without hindering the cash flow of the Association. The Treasurer and Budget chair share monthly bank statements and the financial data base. This has proven to be a successful tool in monitoring the Association's assets.

The two year fiscal audit report for the period July 1, 1995 through June 30, 1997, was completed by Haddox Reid Burkes and Calhoun, certified public accountants in Jackson, Mississippi. The audit concluded that no modifications were required to the accompanying financial statements in order for them to conform with the cash basis of accounting used by the Association.

## **STATE PRESIDENTS**

The nine state presidents represent 60% of the voting membership of the Board of Directors. Their opinions, recommendations and suggestions on what their members need from the regional association are valued and sought. The state presidents for 1997/98 are:

- Clark Aldridge, University of Montevallo, AL
- Wayne Bodiford, South Florida Community College, FL
- Ron Day, Citibank Student Loans, GA
- Douglas Cleary, Asbury College, KY
- Billye Jean Stroud, Mississippi College School of Law
- Kay Stroud, Appalachian State University, NC
- Glenn Shumpert, University of South Carolina at Aiken
- Anne Rader, Bryan College, TN
- Estherine Harding, Norfolk State University, VA

The state presidents took action throughout the year on a variety of items and represented their membership's needs regarding regional matters. The state presidents met prior to the Board meeting to review issues, activities and concerns. They shared information and formed a strong, collaborative body throughout the year. Their insights and perspectives helped to foster the link between their respective state associations and with SASFAA. I believe each of these individuals will continue to be strong SASFAA members and I hope at some point in the future will accept leadership roles within SASFAA's organizational structure.

It has been a pleasure for me to have had the opportunity to visit each of the states (twice) over the past two years and watch the state presidents perform in their leadership roles. Each is a true leader. SASFAA has surely benefited from their involvement and contributions this year.

## **NOMINATIONS AND ELECTIONS/AWARDS/GOVERNANCE AND PLANNING**

Immediate Past President, Joel Harrell, coordinated the efforts of the Nominations and Elections, Awards and Governance and Planning Committee. I will briefly review each in turn.

The Nominations and Elections committee is charged with identification, recruitment and selection of qualified officers for the Association. These officers are responsible for ensuring that the activities and services of the Association support its mission. They, also, have fiduciary responsibility for the Association's income and expenditures. The committee is comprised of the immediate past state presidents or their designee. They included: Jacqueline Bell (Class Credit, SC); Lisa Tumer (Longwood College, VA); Sally Dodd (Davidson College, NC); Debbie Marcus (Bessemer State Technical Community College, AL); Barbara Scheidt (Western Kentucky University, KY); David Gelinis (University of the South, TN); Rick Wilder (University of Florida, FL); Thurman Mitchell (Hinds Community College, MS); and, John Marotta (Class Credit, GA).

The officers for 1998-1999 are:

President: Susan Little, University of Georgia

President-elect: Mary Givhan, Mississippi College

Immediate Past President: Carol Mowbray, Northern Virginia Community College

Vice President: Bill Cox, University of North Carolina at Chapel Hill

Treasurer: Karen Gibson, Edsouth

Secretary: Susan Luhman, Eastern Kentucky University

Six of our nine states will be represented on the Executive Board and the individuals come from diverse institutional types. This will provide for a variety of perspectives on the Board representative of our membership at large.

The Awards committee solicits the names for awards in order to provide the Association with the opportunity to recognize those officers and other members who have made outstanding contributions toward the accomplishment of the ideas which are identified in our mission statement. The awards committee which is comprised of the elected officers selected two individuals to receive the Distinguished Service Award, the highest honor that SASFAA bestows. Since 1981, the Association has bestowed this honor on 21 individuals. The newest members to those ranks are: Karen Fooks and Dave Cecil. Eleanor Morris (University of North Carolina at Chapel Hill) was accorded all privileges of honorary membership.

And, although it is not a SASFAA award, Helga Greenfield was recognized at the conference as the recipient of the NASFAA Leadership Award for her significant achievements on behalf of the financial aid profession.

The Governance and Planning committee is charged with the assessment and evaluation of progress made toward achieving the goals and objectives as outlined in the Five Year Plan. The committee, comprised of two former Board members or representatives to the Board and two relatively new members, met in February and May to contemplate these issues and make recommendations to the incoming Board of Directors. The committee is chaired by the Immediate Past President. Appointment to the committee spans two years. This year's members were: Curtis Whalen (University of North Carolina at Charlotte), Anthony Jones (Tusculum College, TN); Karen Koonce (Tidewater Community College, VA); and, Ginger Klock (North Carolina School of the Arts). The committee's report will be presented at the Transitional Board Meeting in June.

## **CONFERENCE**

The conference committee receives the lion's share of resources. The annual conference is the one event which appeals to the largest number of members. The annual conference was budgeted \$115,000 this year with the expectation of generating \$122,500 in revenue. Although the budget exceeded the expressed figure, the conference did indeed generate a modest revenue. The registration fee was not increased so as not to discourage attendance. Eight hundred and fifty (850) members registered for the conference; 820 were in attendance. The committee is comprised of one representative from each state and strives to ensure sector balance. Committee members included: Bob Godfrey, University of South Carolina; Jennifer Heter, North Metro Technical Institute; Thurman Mitchell, Hinds Community College; Lynne Reinstadtler, Educaid; Janet Sain, ECPI College of Technology; Barbara Scheidt, Western Kentucky University; Debra Talley, University of Alabama at Birmingham; Kurt Wolf, Ringling School of Art and Design and Ron Gambill, Local Arrangements Chair, TSAC. Ex-officio members included: Karen Gibson, Mary Givhan and Susan Luhman. Crusie Lucero provided the exemplary leadership for the committee.

The conference was held at the Renaissance Nashville Hotel in downtown Nashville. The location enabled participants to enjoy some of the local attractions and take in the night live of Nashville at the end of a busy day of meetings. The members of Tennessee Association of Student Financial Aid Administrators (TASFAA) were gracious hosts and I am particularly appreciative of Anne Rader's and Ron Gambill's leadership.

The committee planned a conference to effectively serve the needs of the membership by offering sessions that provided both personal and professional development opportunities. Speakers included motivational speaker, John Molidor and NASFAA President, Dallas Martin. Interaction was increased with other related associations by including presenters from NASFAA, U.S. Department of Education, NACUBO, NCHELP, AACC and member institutions. Sessions were provided on technical and regulatory issues.

The committee met every deadline it established and messages flew via its listserv on a daily basis. It clearly demonstrated the value of a committee listserv for sharing information, ideas and maintaining its schedule.

We were particularly pleased to highlight a talented student's design for the cover of the program. It was designed by Garth Webb, a student in the department of Graphic and Interactive Communication at Ringling School of Art and Design.

## **MEMBERSHIP**

Rose Mary Stelma (East Carolina University, NC) completes a two-year stint as membership chair. The responsibilities are both tedious and detail-oriented. She maintains the membership database ensuring accuracy of information which is subsequently shared with a variety of individuals including the Treasurer, Communications chair and Newsletter editor. During this past year, Rose Mary "reached out" for new members by mailing letters of membership invitation to schools listed in the Title IV school code book that were not currently members. Her efforts netted SASFAA forty-seven (47) new members.

She assists in updating and mailing the membership form, preparing, printing and distributing the membership directory and assisting with registration activities. The 97/98 Membership directory has been distributed in keeping with our June deadline and should now be on our members shelves. This year's distribution is expected to result in savings to the Association as three-ring binders were distributed to members last year. This year only the "guts" of the directory will need to be mailed. I know that Rose Mary will enjoy the opportunity to ATTEND a session next year at the annual conference because her duties during the past two conference as membership chair precluded the opportunity to do so.

Final membership figures are not available as of this report.

## **NEWSLETTER**

Based on the results of a communication survey to members during February 1997 and the guidance contained in the Long-Range Plan, Zita Barree (Virginia Commonwealth University) made some changes in the format, content and appearance of the newsletter. Newsletters are printed and distributed on a quarterly basis, generally in August, November, March and June. The newsletter editor works closely with certain committees including: Nominations and Elections, Sponsorship, Conference and Communications. The newsletter was published on the web page in advance of members receiving it on their desks due to the close coordination with the Communication's chair. Zita formed an editorial board this year that included: Scott Brown (Francis Marion University, SC); Bill Cox (University of North Carolina at Chapel Hill); Guy Gibbs (Northern Virginia Community College, VA); and Anthony Jones (Tusculum College, TN). The editorial board reviewed the content of articles, wrote articles and proof-read. Zita introduced some new featured articles including: "The SASFAA Scoop" and "The Bridges of SASFAA". She did all the layout work for herself which resulted in significant savings to SASFAA.

Zita kept the newsletter on its rather tight timeline and prodded all of us, including me, into getting her the copy for the newsletter as quickly as possible. Some of us needed more prodding than others - no manner of persuasion will get me to divulge this information.

In brief, Zita produced an attractive, timely publication that provided the type of newsy information that our members have requested and she did it while exhibiting grace under pressure.

## **POLICY AND PROCEDURE MANUAL TASK FORCE**

The creation of the Policy and Procedure Task Force came directly from the recommendations and observations of the Long-Range Plan. Simply put, our P&P manual needed an overhaul. Charged with the task

was Bill Wall (Alabama Commission on Higher Education) and early author of our existing Policy and Procedure Manual. Along with Bill, Vera Brooks (SASFAA Secretary), Randy Craig (Educational Credit Management Corporation, VA), Judy Deines (Jefferson Community College, KY), Vernetta Fairley (University of Southern Mississippi), Claudia Geary (Bank of American, FL), Joel Harrell (University of Tennessee at Chattanooga), and I toiled. To give credit where it is due, the effort began in February 1997 when Joel Harrell generously offered the additional lead time to bring this project to fruition.

This task force deliberated painstakingly over the nuances of our P&P Manual. They concerned themselves with such matters as font type and size, outline types, chair vs. chairperson and all manner of issues that would make this document easier to read, to understand, and to use. Their hard work has reaped the benefits of a document which we all can comprehend. It lends itself to the web site, can be more easily maintained, and is well organized. The Board of Directors will vote on adoption of this manual in June.

In their review and research, they also identified some areas in which procedures are needed. These issues will be taken up during the course of the next year. This is a "living document"; one which will accommodate the changes that the Board approves.

Certainly, there were times when they didn't think they could complete the task. But they did and I congratulate them for their tenacity and perseverance. There is a bet on amongst this group that this document will bear the test of time for at least another 20 years. Any takers?

## **SITE SELECTION**

Dave Cecil knows how to drive a hard bargain and that's exactly what you look for in a site selection chair. Dave completed negotiations with the Hyatt Regency Resort in Hilton Head for the 2001 annual conference and secured a room rate of \$107 single or double. The 2001 meeting is scheduled for February 11 to the 14. If you have forgotten the appeal of Hilton Head in February, take another look at Karen Fook's Annual Report of June 1996.

Dave was also instrumental in the negotiation and review of other hotel contracts including those for committee meetings, the Transitional Board meeting, the Management Institute and the other Board meetings for this year and next.

Dave will be soliciting site proposals for 2002 shortly. He is particularly interested in soliciting proposals from the states of Kentucky, Alabama and Florida. SASFAA has always made an effort to move its annual meeting throughout the region to give individuals, who might not otherwise, the opportunity to attend.

## **SPONSORSHIP**

Susan Luhman, Eastern Kentucky University, handled her responsibilities superbly. She was aided by two other individuals, Al Pratt, Education First, and Sandra Rockett, Dyersburg State Community College. Susan exceeded budget goals for sponsorship and advertising significantly although the final totals are not yet available. Susan worked closely with sponsors, exhibitors and advertiser to define their needs and then be sure these needs were addressed. She designed the exhibit space for the conference by working closely with the drayage company. More than 50 organizations exhibited at the conference. Susan continued throughout the year to identify areas for sponsorship and is still hard at work at this late date.

At this writing our sponsorship is over \$61,000 and advertising is at more than \$32,000 for the newsletter and directory. We could not have had such a successful year financially without the indefatigable efforts of Susan

Luhman as well as the consistency and generosity of our many sponsors.

## **AGENCY LIAISONS REPORTS**

There are four liaisons to the Board of Directors. They present information from external sources which are relevant to the proceedings of the body. They include: Foundation, Lenders, State Agencies, and the U.S. Department of Education. I will discuss each in this order:

Robert Bennett (Pickett and Hatcher Educational Foundation) has served as a long time representative for private foundations. As state and federal funding stagnates, we need to recognize the valuable and significant contributions made through private funding sources. In addition to providing updates regarding foundation activities and interests, Bob alerts us to impending tax issues and other concerns which may effect private giving. Bob also wears another hat for SASFAA. He serves as archivist maintaining the documents and relevant correspondence of SASFAA.

Faye Becker (First Union National Bank) was the lender liaison to the SASFAA Board. She provided meaningful, unbiased perspectives on issues which are of concern to the lending community. She gained information from a network of lenders and submitted articles on pertinent issues to the newsletter. Faye raised the impending change of interest rates at the Board meeting making a complex issue more tangible and understandable. Her reports were helpful and informative and brought to the table some of the more immediate issues facing lenders.

Ron Gambill (Tennessee Student Assistance Corporation) as guaranty/state agency liaison solicited reports from each of the other states to provide updates on their direction, issues and activity. Ron brings a knowledgeable, experienced perspective to the table with respect to guaranty agency concerns on managing the student loan programs as well as the state grant programs. Ron has an extensive and well-honed legislative network; his reports stimulate discussion and broaden our perspective as financial aid administrators.

Our nine states are served by three U.S. Department of Education regional offices: Regions III, IV and VII. The goal this year was to rotate participation so that all three representatives from Regions III and IV could attend a board meeting and all three would attend the annual meeting. Well the "best laid plans of mice and men often go awry" for personal matters have prevented our Region IV representatives from attending a meeting this year. Our three representatives are:

- Barbara Gray, Atlanta, Region IV
- Gregory Martin, Philadelphia, Region III
- "Skip" Pou, Atlanta, Region IV

Due to personal circumstances, neither Barbara or Skip were able to attend a meeting this year. We were fortunate that Greg Martin was able to adjust his schedule to attend three of our four board meetings. However, all three collaborated on providing us with reports to keep us abreast of regulatory developments and legislative issues. They submitted newsletter articles, prepared interest sessions and clarified questions. They are excellent resources and each generous "to a fault" with his or her time. We are indeed fortunate to have such knowledgeable and helpful resources in our midst.

## **CONCLUDING REMARKS**

We have accomplished a great deal this year for an association comprised solely of volunteers. Yet, we are never done. Each individual has been so generous with his time. Time which comes at some sacrifice to family, friends and the development of other interests.

I want to extend my personal appreciation and gratitude to each officer, chairperson, liaison, and member who volunteered some time and effort on behalf of SASFAA. It has led to a most satisfying and rewarding experience for me and I hope has been gainful for each of them as well.

I appreciate the encouragement my husband, Alan, gave me throughout the year especially when I know how many hot dogs he consumed while I was traveling to the state and committee meetings. I also appreciate the support of Northern Virginia Community College and in particular, my boss, Dr. Max Bassett, Dean of Academic and Student Services, and the hard-working staff of the College Financial Aid Office for enabling me to have the opportunity to continue my involvement in SASFAA.

I know that Susan and her team will keep us moving forward. SASFAA is certainly a leader among the regional associations and we have much of which to be proud. It has been a pleasure serving as your president for this year. The experience has left me with memories that I will long cherish.

Respectfully submitted,

Carol Mowbray  
President

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