

1999-2000 SASFAA Annual Report

Mary Givhan, President

June 8, 2000

Dear SASFAA Colleagues:

As I prepare to write this annual report by becoming thoroughly acquainted with each committee and officer's annual report, I am reminded of how blessed we are to have such dedicated volunteers to serve our associations. The Board consists of individuals who have made a significant time commitment to ensure that the work of the association is done. They have sacrificed family time, adding a few hours to their work day, and have spent days out of the office away from their "day job" to serve this association. These individuals have embraced their Board responsibilities with a lot of passion. They are individuals who really care about this association. As you read this report, I hope you too, can sense their dedication to SASFAA and our profession. I am very thankful that each one of them agreed to serve on my Board.

In a few days I will hand over the gavel to the next SASFAA President, Bill Cox. It will be both exciting and sad as I do so. But, it is time now for someone else to take the drivers seat and lead this association further into the new millennium

It has been a pleasure to serve this association. I couldn't have asked for a better group of people to work with or to work for. It has been an honor for me to say to people I have met that I am the President of SASFAA.

I hope we are friends and colleagues forever. See you at the next juncture.

Sincerely,

Mary Givhan
SASFAA President

SASFAA ANNUAL REPORT

1999-00

As stated in other annual reports, this has been a very active year for SASFAA. The committees have done their work, or paved new ground for next year's board. There are a few highlights that I list below:

The Finance and Audit Committee has been very successful in carrying out the recommendations of Treasurer/Financial Task Force. The Treasurer has been relieved of some duties that will make this job less time consuming.

A very active State President group was successful in setting up a meeting with the Department of Education. Many of them had similar concerns as it related to training issues. It is hoped that through this partnership with the Department that these issues can be addressed thus meeting the needs of each state associations.

The process of organizing SASFAA's history began. Curtis Whalen chaired the History Task Force. Assisting him were committee Dave Gelinias and Cruise Lucero. The committee identified three areas to focus their efforts.

Documentation:	What We've GOT Related to History
Verification:	What We DO Related to History
Exploration:	What SHOULD We Do Related to History

A brochure outlining significant events in SASFAA's history was prepared and distributed at the annual conference. A videotape was made which included interviews with past SASFAA presidents and other significant individuals.

The SASFAA Long-Range Plan was reviewed and updated. Based on the membership survey conducted in 1998-99, diversity and research were included in the plan. Marvin Carmichael was chair of the Committee. Serving with him were Lisa Tumer, Susan Little, Bill Cox and Curtis Whalen. The plan will be presented at the June Board meeting.

Communications

Under the guidance of our Web Master, Karen Fooks, the web site was completely redesigned to give it a more pleasing design and make it easier to navigate. In addition she was successful in registering sasfaa.net and sasfaa.com to prevent others from using these domains. More than 7600 hits have been made on the web site. This was a slight increase over previous years. She feels that this is definitely below the potential use for the site.

It has continued to be a source of frustration to get timely information to keep the web site current. Karen reports that the use of the web for information sharing remains an after-thought rather than an on-going function. She recommended that next year's President and President-Elect make a decision as to whether the association would be better served using electronics as a primary communication

vehicle and paper eliminated or much reduced or if things should remain as they are. If electronics communications is deemed to be the priority means of communication, then a commitment should be made by all board members and committees to effectively use SASFAA's electronic devices.

Data sharing between the membership chair, newsletter chair and communications chair has been difficult because the software used by each is different. This resulted in delays of up to 60 days in updating the membership database on the web and manually typing the newsletter. Karen recommends that the computer programs and/or formats should be standardized. Changes in software, programs or formats by either should be coordinated with the communication chair.

The committee was also charged with investigating whether to continue maintaining the web with volunteers or outsourcing the site to a professional design team. Karen does not recommend a move of this sort at the present. The infrequent addition of new materials does not warrant the cost of outsourcing the web site.

Conference

The Conference Committee, under the leadership of Kay Stroud, succeeded in meeting its primary objective – design, plan, and execute the best SASFAA conference. Assisting Kay in the endeavor were committee members Jean Dobson (Oxford College of Emory University), Sally Dodd (Davidson County Community College), Kathleen Donohue (Nellie Mae), Cynthia (Penny) Hill (University of Southern Mississippi), Jennifer Jones- Gaddy (South Carolina Student Loan Corporation), Jan Kind (Murray State University), Louanne Langston, Local Arrangement Chair (USA Group), Evelyn McKeithen (Troy State University at Montgomery), Carol Mowbray (Northern Virginia Community College), Lynne Reinstadtler (Educaid, A First Union Company), Brent Tener (Vanderbilt University). Ex-officio members of the committee included Judy Deines, Vice President; Thelma Ross, Sponsorship Chair and Karen Koonce, Treasurer. Using the theme Celebrate SASFAA, Technology, Education, Diversity, the committee planned a conference that offered concurrent interest sessions of a wide variety that were appropriate for all levels of experience. Over fifty interest sessions and three general sessions were offered. During the opening session, Bobby Mahoney, a local restaurateur, welcomed everyone to the Mississippi Gulf Coast. Dr. Belle Whelan, President of Northern Virginia Community College, gave a very inspiring and uplifting motivational speech during opening session. 799 SASFAA members attended the conference.

It was the intent of the committee to offer social activities that encouraged participation and fellowship. After the banquet on Tuesday evening, the membership was offered an opportunity to dress up in their finest and enjoy entertainment together.

The conference was held at the Grand Casino Hotel in Biloxi, Mississippi. The last conference held in Mississippi was in 1980. Having returned to Mississippi after a long absence, the committee felt it important to remember the hospitality of the Mississippi Association. The displays in the MASFAA Hospitality Suite definitely aided in re-introducing the membership to Mississippi and was a show case for some of the state's local color.

The Local Arrangement Committee, under the leadership of Louanne Langston, organized a successful community service project. Association members graciously donated educational materials and a cash donation to the Boys and Girls Club of Biloxi.

Recommendations by the conference committee include developing a Conference Committee Handbook, setting up a conference committee space on the web site, setting up a

speaker/moderator/room monitor listserv and setting up a vendor area on the web site where vendors could easily get all the needed information pertaining to exhibiting and sponsorship.

Finance and Audit

Randy Craig, Chair, along with his committee members Jacqueline Bell, Charles Vinson, Robert Kersey, and Teri Parchment have had a very busy year. Being a past SASFAA Treasurer, Randy was very much aware of the importance of his role and the work of this committee. He was very conscientious of the oversight and management of the association's funds.

In 1998-99, President Susan Little formed a Treasurer/Financial Task Force whose purpose was to examine the duties and responsibilities of the Treasurer and make recommendations as needed. Based on the Task Force's recommendation the Budget Committee was renamed the Finance and Audit committee. The name better reflects the activities of this committee. Many other recommendations from this Task Force also effected this Committee. This committee was responsible for taking the recommendations and putting them into practice.

One of the primary responsibilities of the committee is to construct the association's budget. Randy Craig took an interactive approach to building the budget by involving Board members in the construction of the budget. Using this approach would hopefully provide a more accurate and meaningful projection of the association's expenses. This approach proved to be effective and he recommends that this approach be continued.

The committee used a new investment strategy this year. Funds were placed in a mutual funds account instead of putting them solely into Certificates of Deposit thus resulting in a higher annual yield. The committee was also successful in performing the annual audit of the 1998-99 financial record. Committee member Jackie Bell and EASFAA past Treasurer Dave Myette assisted Randy in the audit. Other accomplishments made by the committee include revising the Guide to Financial Management and the Guidelines and Procedures for the Office of Treasurer. Both of the documents provide guidance for the Finance and Audit committee and the Treasurer in administration of the association's funds.

Governance and Planning

Past President Susan Little has diligently guided her committee in producing a document which gives a thorough evaluation of this year's endeavors using the Strategic Five Year Long Range Plan as their guide. Under each section of the Plan, the committee has made comments and recommendations which will help in improving the way SASFAA conducts its business. They did not leave a stone unturned. The recommendations will be a valuable tool for the incoming SASFAA Board.

Serving on the GAP committee with Susan were Clark Aldridge (University of Montevallo-AL), Kitty McDonald (edsouth), Dyann Moses (Mary Holmes College-MS), and Betty Whalen (Winthrop University).

Legislative Relations

Willie Williams served as chair of this committee for the 1999-00 school year. Willie solicited input from SASFAA relating to NPRMs. He also encouraged SASFAA constituencies to review NPRMs and submit concerns to the Department of Education. Willie also communicated legislative issues to the association by posting notices on the SASFAA listserv and newsletter article.

Membership

Melissa Ellyson, Membership Chair, took on the task of completely overhauling the membership database. She reports that using Microsoft Access will allow for greater manipulation of the membership data. The use of this software also allowed for greater ease in tracking information during the annual conference. One of the recommendations from the Task Force was that one membership database be maintained. In the past the Treasurer and the membership chair maintained the database. Tracking and maintaining membership information is a function of the membership committee and not the Treasurer.

The membership chair works closely with the Treasurer at the annual conference during the registration process. Melissa recommends that the membership chair and treasurer begin to communicate early to be aware of the needs in relationship to planning the membership drive. She further recommends that the membership chair be an ex-officio member of the conference committee.

Current membership of the associations totals 1393 with a breakdown of the membership as follows:

STATE	PAID 1999-00
Alabama	105
Florida	232
Georgia	154
Kentucky	95
Mississippi	104
North Carolina	163
Tennessee	164
South Carolina	115
Virginia	149
Other	112

Newsletter

In her second year as Newsletter Editor, Ann Hendrick has continued to produce a quality newsletter that our association can be very proud of. Ann has worked hard to meet the newsletter deadlines which ensures that information be made available to the membership in a timely fashion. The use of photographs in each issue brings the activities back to life again. Assisting Ann on the editorial board were Cheryl Hughes, (SC Student Loan Corporation) and Jane McNaughton (Union Planters Bank).

Ann states that the most significant accomplishment was to meet with the state presidents before the first issue to provide a forum for the sharing of ideas and information. She continues to stress establishing an early relationship with a printer and the Sponsorship chair.

Nominations and Elections

Susan Little, Past President and Chair of the Nominations and Elections Committee was successful in bringing forth the association a dual slate of candidates for our elections of officers at our annual

meeting in February. The membership voted Clark Aldridge, President-Elect, Rosemary Stelma, Vice President and Guy Gibbs, Secretary. The committee also recommended nominees for SASFAA's Distinguished Service Award. This honor was bestowed on Joel Harrell. Karen Fooks was recognized as the recipient of the NASFAA Leadership award for her achievement on behalf of the financial aid profession.

The committee was also asked to continue to explore whether the voting procedures of the association should be changed. They recommended that there be no change in voting procedure but to increase voter participation. That was accomplished by reminding the membership of absentee balloting, placing the voting booth in a prominent location, placing "I Voted" stickers on each voters name badge and leaving the voting booth open in accordance with the policy and procedures. This resulted in over 592 members voting in the election.

President-Elect

Bill Cox has been very busy this year preparing for his year as SASFAA president. In addition, Bill has been actively involved on the Board by serving on several committees whose work will have an impact during his year as President. In his role as President-Elect, Bill served as an observer on the NASFAA Board and gave a summary of these meetings to the SASFAA Board. Bill also shared this information with members of the association by including his reports in the newsletter. Setting on the NASFAA Board also gave Bill the opportunity to establish a relationship with the other regional presidents-elect that allowed him to share ideas and issues as he plans for his year as association president.

Bill has traveled to several states this past year giving him the opportunity to identify individuals who would possibly be interested in serving on the next year's Board or committee.

To prepare the state presidents-elect for their role on the SASFAA Board, Bill solicited the assistance of Marvin Carmichael (Clemson University), SASFAA Past President to organize and conduct a one day workshop which was held at the annual conference in February. In addition, the state presidents-elect were also given an opportunity to meet with the current state presidents where they shared their experiences on the SASFAA Board. Bill will continue with training effort for this group at the transition board meeting in June. Bill wants to make sure that this group have a good grasp of their responsibilities before they start their term.

Professional Development & Vice President

Judy Deines has embraced the role of Vice President with a lot of zest and enthusiasm. With assistance from Dave Cecil, Site Selection Chair and Bill Cox, Judy recommended Furman University in Greenville, South Carolina as the host site for the annual Summer Workshop for New Aid Officers. Assisting Judy will be Dick Smelser, (Maryville College, TN) Curriculum Coordinator and Lynda Sayer, Site Coordinator. Both Dick and Lynda have serve as past instructor for the Summer Workshop. Judy has been successful in recruiting twelve outstanding financial aid administrators to serve as instructors and three assistants to aid with the day to day activities of the workshop. To ensure quality programming, Judy will limit attendance to 120 participants. As we approach the end of our year, Judy's main event has yet to happen. The workshop is scheduled for June 18-23.

Instructors for the workshop include: Brad Bennett (Virginia Commonwealth University), Patty Cope (Haywood Community College), Ron Day (Reinhardt College), Sally Dodd (Davidson Community College), Bob Godfrey (University of South Carolina), Sherwin Hibbets (Regent University), Maureen

McFarlane (Mid-Florida Tech), B.J. Moncure (Jackson State University), Darolyn Parks-Porter (Austin Peay State University), Ruth Strum (Clearwater Christian College), Ray Tripp (University of Georgia), and Dave Wuinee (Bellarmine College). Assistance include Elizabeth Daniel (National Education), Jennifer Jones-Gaddy (SC Student Loan Corporation), and Chuck Parker (Nellie Mae).

Judy also coordinated a one day New Aid Officers Workshop at the annual conference. Assisting Judy in the endeavor were Dick Smelser and returning workshop instructors.

In her role as Professional Development Chair, Judy also served on the Decentralized Training Task Force who will bring a recommendation to the June Board meeting concerning SASFAA offering NASFAA Decentralized Training throughout the SASFAA region.

The training workshops and professional development workshop offered by SASFAA are considered to be some of the best that are offered. Judy recommends that there be periodic surveys of the membership to continue to assess the training needs of the association.

Secretary and By-Laws Committee

Susan Luhman was unable to serve her last year as SASFAA secretary due to the fact that she was no longer a practicing financial aid officer. By a unanimous vote of the Board, Guy Gibbs assumed Susan's unfinished term. Guy has proven to be a tremendous asset on the Board. His attention to detail and timely dissemination of information has greatly enhance Board communication. In addition to recording the actions of the Board, Guy has successfully coordinated housing accommodations and meal functions with the hotels.

Guy has also worked closely with Past President Susan Little in the continued development of the SASFAA Operational Calendar that Susan began during her year as President. He has also reviewed and updated the SASFAA Policy and Procedure Manual which will be acted on at the June Board meeting.

He also recommends that at the July Board meeting the Board should be informed that it is their responsibility to review the By-Laws and Policies and Procedures Manual and bring any changes to the Secretary's attention.

Site Selection

Dave Cecil's knowledge about contract negotiation has been a valued asset to the Board. His accomplishments this year include recommending the Adam's Mark Hotel in Jacksonville, Florida as the site for the 2003 conference, assisting the Vice President in securing a site for the 2000 summer workshop and negotiated a contract for the July 2000 Executive Board meeting. Dave recommends starting the process early next year to secure bids from the two states that have not hosted the conference in the longest time: Alabama 1993 and Georgia 1995.

In addition to his committee work, Dave has also been a valued board member. His wisdom and insights have added to discussions, which has been a tremendous help when decisions have had to be made.

Sponsorship

Thelma Ross served a second year on the Board as Sponsorship Chair. She was very successful in securing ample sponsorship for the annual conference, meal functions at the Board meetings, and sponsorship for activities at the Summer Workshop. This type of support greatly reduces the financial obligation to the association. We are very fortunate to receive the amount of support from our vendors and sponsors. Thelma was committed to getting the best deal possible. To show our appreciation to our vendors and sponsors an appreciation breakfast was held for them at the annual conference.

Our ability to accommodate space for the vendors is determined by the amount of exhibit space available at the site hotel. Unfortunately, because of limited space, some of the requests could not be met. Thelma recommends that the Board take a serious look at increasing the thresholds for exhibit space and sponsorship for the annual conference.

State Presidents

The State Presidents meet as a collective body in advance of each Board meeting to report to each other state activities and to discuss issues that they may have in common. In addition, the group provided a great source of support for each other. The state presidents for 1999-00 are:

Dorenda Adams, Alabama State University, AL
Kurt Wolf, Ringling School of Art and Design, FL
Deborah Clark, Atlanta Technical Institute, GA
Anthony Bowles, Western Kentucky University, KY
Bruce Crain, Mississippi State University, MS
Janet Sain, ECPI College of Technology, NC
Earl Mayo, South Carolina Tuition Grants Commission, SC
Lori Hartman, University of Tennessee-Memphis, TN
Zita Barree, J. Sargeant Reynolds Community College, VA

The group selected Janet Sain to coordinate their activities. This group has been very busy this year making sure that the needs of their associations are communicated to the Board. They were a very strong group and definitely fulfilled their role as advocates for their state associations. Some of their accomplishments include the sharing of state activities, issues, concerns and ideas, comparing budgets and costs associated with conference, executive boards, training and development, registration fee and membership fee structure, sharing state policies and procedures manual and by-laws, and recommending conference site. The State Presidents were instrumental in creation of the Decentralized Training Task Force who will make a recommendation concerning SASFAA sponsoring the decentralized training offered by NASFAA. The group also generated dialogue between the State Presidents and the Department of Education Liaison in order to address training issues and other school related issues. They made arrangements for Kay Jacks with the Department of Education, to attend the June Board meeting to address these issues face to face. The group recommends that the dialogue between the Department and the state presidents be continued.

Each state should be aware that their President has represented them well on the SASFAA Board. It is through this group that SASFAA become aware of the pressing issues of the association. The State Presidents have direct contact with their members and are in a position to make these issues known to the Board.

Treasurer

With the recommendations made by the Treasurer/Financial Task Force, Karen Koonce was able to

use her time doing treasurer type functions. Duties once performed by the treasurer were moved to other more appropriate committees.

As we enter into the age of electronics, Karen has successfully implemented PC Banking. She has taken much care in making sure that each expenditure is properly documented.

Foundation Liaison

Ken Owens served on the Board this year as the foundation liaison. Pickett and Hatcher Educational Fund, Inc. continues to maintain the SASFAA archives file.

Ken's main objective was to advise the Board of significant state and federal legislative issues pertaining to foundations that could impact student financial aid funding. He also indicated that the Board might wish to look at new ways of archiving the association's documents. The records are now placed on microfilm. Perhaps this is an appropriate time to move towards the appointment of a historian.

Lender Liaison

Tom Hood with Sallie Mae served as the Lender Liaison on this year's Board. His primary goal was to enhance communication between lending community participants. In order to accomplish this goal, Tom established an e-mail list of lenders as a tool to communicate with this group. However, Tom did not receive any responses from the list he established and attributes this to disinterest or unwillingness to become involved. He found it difficult to form a partnership with the lending community with there being too many vested interests independent of the goals of the liaison.

Tom's report to the Board included debt management, Master Promissory Note, federal cost of the FFELP program and calculating interest rates. One of Tom's most informative reports focused on credit card debt.

Department of Education Liaison

Representing the Department of Education on the Board were Barbara Gray, Greg Martin and Skip Pou. The information they shared with the Board was timely information which enable us to be better informed as we continued through the negotiated rulemaking process and in issuing of final regulations. This provided a forum where Board members could ask questions for clarity and to voice their concern about such issues as the Return of Title IV funds calculation. In addition to providing information to the Board, they also submitted newsletter articles so that all of the membership could be informed and benefit from their knowledge and expertise.

State Agency Liaison

Ron Gambill served as a liaison on the board to represent each of the state agencies in our nine state regions. Ron's informative report kept the Board informed of the activities of the agencies in our region. In addition, Ron's knowledge of the legislative process, legislative issues that affect the financial aid profession and his commitment to serving students and his colleagues, has placed him in the positive of being a tremendous resource to our Board. Ron provided comments relative to the regulatory proposals developed from the 1998 Reauthorization and the negotiated rulemaking process. To keep the membership abreast, he prepared articles to be included in the newsletter about negotiated

rulemaking issues.

Ron states that all state agencies have a common goal to provide significant financial resources for the students they serve. He recommends that a strong communication link be maintained with the states so that the collaborative goal of serving students can be strengthened.

Summary

SASFAA could not have asked for a better group of individuals to serve the associations this year. I hope that through this report you could see how everyone has worked to carry out their duties and responsibilities. If any of you are inspired by what SASFAA has done, please consider volunteering and become a part of a group of caring individuals whose purpose is to serve students and be a support group to each other.

I am indebted to each individual who served this year. Without their dedication, the work would not have been done. I will leave a much richer person. This entire year has been a learning process for me. The lessons that I have learned will help me personally and professionally. I am leaving a much better administrator than when I began. I would not trade this experience for anything.

Thank you for allowing me to serve you this year as President. I have pledged my support to Bill Cox as he assumes these duties next year. The association will be in good hands. He will serve you well.

Respectfully submitted:

Mary Givhan
SASFAA President

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