

# **SASFAA Annual Report**

2009-2010

Southern Association of Student Financial Aid  
Administrators, Inc.

July 2010



Prepared by Keith Reeves  
SASFAA President, 2009-2010  
In Compliance with SASFAA Bylaws, Article VII, Section 1

## **SASFAA Annual Report 2009-2010**

This annual report is a review of the activities of the officers, state presidents, committees and liaisons for 2009-2010 and serves as the President's report to the SASFAA membership. This report summarizes the goals established by each of the officers, committee chairs, and liaisons, and will focus on highlights of their accomplishments. The entire Executive Board, including committee chairs and liaisons, should be commended for their achievements during a very challenging year legislatively and fiscally.

### **President**

The 2009-2010 SASFAA Board, committee chairs and liaisons met to transition on June 6, 2009, and together we discussed some of the issues that we anticipated that we would face during the year, particularly in regards to the budget. I was proud to have selected a mix of new and returning committee chairs to the board. There were chairs returning to the same position, two prior-year committee chairs in new capacities, and seven new committee chairs to the Board. All nine states were represented, and various school and educational agency sectors were represented as well.

After a team-building exercise led the Dr. Barry Simmons, NASFAA Chair-Elect, I discussed the goals and objectives of SASFAA:

- Support professional communications in all areas concerned with the administration of student educational financing programs;
- Promote the development of future leaders by actively involving its membership;
- Ensure representation of all major types of financial aid professionals in the region through its membership;
- Enhance alliances between and among various sectors of the student financial aid community;
- Appraise members of legislative issues affecting the profession, encourage involvement on issues, and advocate positions when reasonable consensus exists;
- Help educate members about alternative methods to finance education and/or administer student financial aid programs;
- Provide for the professional growth and competencies of members by offering workshops, seminars, meetings and other training opportunities to meet the need of the membership;
- Provide for and ensure the future stability of the Association through careful and regular financial planning and evaluation; and
- Maintain the bylaws and policies and procedures to ensure they are accurate and complete, in order to further the mission of the Association and ensure its fiscal integrity.

In addition to these goals, SASFAA maintains its purpose and pledge to offer personal and professional development opportunities. Five specific "training" goals for the year included the

following:

- A one-day New Aid Officers Workshop was held prior to the Annual Conference that was attended by 18 individuals.
- A two-day Midlevel Workshop was offered prior to the Annual Conference (instead of being a stand-alone event) that had 26 participants.
- A successful pre-conference workshop entitled **Successful Collaboration – HEOA Final Regs** had an attendance of 85.
- Our Annual Conference held in Louisville, while down in attendance (357), was a success. Florida and Virginia were recognized for their NASFAA state awards.
- Finally, our premier New Aid Officers Workshop was held at Clemson University for the second year in a row in June 2010, with 96 participants – nearly a 30% increase in attendance over the prior year.

Although I provided ideas and suggestions regarding the goals and direction of the Association, the officers, committee chairs and liaisons are to be commended for the work and diligence in moving the Association forward under difficult budgetary constraints. Their many activities and accomplishments are summarized in the next several pages.

Representing you at the NASFAA conference in San Antonio, TX was my first official duty as your President. As you may recall, issues with former NASFAA President/CEO Phil Day surfaced a couple of days prior to the conference – an issue that would dominate NASFAA board meetings for the rest of the year. At the conference, VASFAA and FASFAA received NASFAA State Awards, and it was announced that Janet Sain had been awarded the NASFAA Regional Leadership Award.

This may often be an overused term, but it truly has been an honor and a privilege to serve as your President. The outlook at the beginning of the year was very bleak – we were at the height of the credit crunch, lenders were dropping out of the FFELP program, institutional travel budgets were frozen, and we knew of President Obama’s desire to eliminate the FFELP program completely (surely, that would never happen). Yet, these difficulties provided opportunities. While not all of our positions were upheld by Congress, we were heard by them and our opinions sought after. Little did I know that I would wind up on “speed-dial” lists of several education staffers for US Senators and Representatives. And all along the way, I was encouraged by the appreciative comments I received from our members for SASFAA taking a stand on the issues. From various comments I received from other regional presidents, this kind of support was not present in other regions, and they did not take a stand on the issues.

Thankfully, previous leaders of the Association had the wisdom to put aside and invest excess income in better days to provide a reserve fund. With a significant reduction of the membership and sponsorship revenue, primarily due to changes in the student loan industry, current income does not meet current expenses. Hard decisions were made to reduce expenses where possible, but existing contracts for conference locations, that were signed 3-4 years in advance, obligated SASFAA to certain levels of expenditures. Significant contractual obligations that impacted the level of the reserve fund: We did not meet the minimum room block for the

2009 Myrtle Beach conference, resulting in a \$28,000 penalty; We exercised a cancellation clause with the Hyatt in Louisville, KY, resulting in a \$49,000 penalty (the Hyatt was originally contracted as an overflow hotel when the original contracts were signed with the Marriott as the primary hotel); After renegotiating the Marriott contract to reduce the room block, we still did not meet the minimum room block for the 2010 conference, resulting in a \$28,000 attrition penalty. In addition to the room block issues, the contracts had food and beverage minimums that, in essence, caused us to spend more on these items than we would have based on the number of attendees. The good news is that we have worked our way through all (except for Jacksonville) the contracts that were negotiated when we were experiencing conference attendances between 800 and 1000. Future contracts should be more favorable.

Our budget crunch also did not allow me to attend any state meetings, which was regrettable on a personal note. I had looked forward to visiting each state and absorbing some of the local characteristics of the membership. I did, however, appoint a representative from the SASFAA Board to provide a SASFAA/NASFAA update at the state conferences and I hope the information they shared was useful. Hopefully, funding can be restored to this activity as it is an important link between SASFAA and the states.

Another responsibility of the SASFAA President is to represent SASFAA on the NASFAA Board of Directors and serve on the Executive Committee of the NASFAA Board. As usual, NASFAA had many issues to deal with, not only legislatively, but also internally, as the Board had to work through the resignation of Phil Day, provide guidance during the interim leadership of Joan Crissman, and the selection of Justin Draeger as the new President/CEO. Like the regions and states, NASFAA too, is experiencing financial issues.

Legislatively, 2009-10 was a very active year and SASFAA was vocal in advocating our position to our legislators. I was very pleased with the unity of the board when deliberating the issues. Your representatives on the SASFAA Board were able to put aside individual (and/or institutional) views and focused on what was important to our profession as a whole.

If you have questions about any of the activities conducted by SASFAA please do not hesitate to contact any member of the 2009-10 SASFAA Board of Directors, but you may reach me at 864.656.5085 or at dkr@clermson.edu. I will never forget my experiences and thank you for the trust you placed in me to lead this rich, cultural region full of diverse, wonderful professionals who care and make a difference not only for the SASFAA region but for all of America.

#### **Immediate Past President**

Heather Boutell (Kentucky, 4-Year Private), as Immediate Past President, was responsible for Nominations and Elections, professional recognition and awards, and compilation of the Governance and Planning (GAP) report.

The Nominations and Elections Committee worked extremely hard to identify qualified candidates for SASFAA elected positions. After Board discussion and approval, a full slate was

provided for each office. Information was provided on the SASFAA listserv informing the membership about the upcoming elections, and in the SASFAA newsletter with online voting details, and the photos, bios and candidacy statements. Online voting commenced 10 days prior to the annual conference. Brad Barnett from James Madison University was elected to the position of President-Elect, Brenda Burke from Virginia Commonwealth University was elected to the position of Vice President, and Amy Berrier from the University of North Carolina - Greensboro was elected to a two-year position as Secretary.

The following awards were presented at the annual conference:

- SASFAA Distinguished Service Award was presented to Deborah (Dee) Talley. Dee is a long-time contributing member to SASFAA and AASFAA.
- A special Distinguished Service Award was presented to Senator Lamar Alexander of Tennessee for his long-time support of higher education.
- Janet Sain was presented the NASFAA State and Regional Leadership Award by NASFAA National Chair Barry Simmons.
- The Executive Board submitted the nomination of Brent Tener to NASFAA for the NASFAA State and Regional Leadership Award, and he was recognized at the NASFAA conference in Denver in July 2010. The award will be presented “officially” to Brent by National Chair Laurie Wolf at the SASFAA Annual Conference in Jacksonville, FL, in February 2011.

The GAP committee met in April to compile the annual report that was presented to the SASFAA Board in June. The GAP report is available for review on the SASFAA website.

Finally, Heather has “been there” for me when advice was needed throughout the year. It was a pleasure to present her with her service plaque at the conference for her stint as president-elect, president and past-president. On behalf of SASFAA, and personally, I thank her for the many years of service she has given to SASFAA.

### **Vice President**

Kim Jenerette (South Carolina, 4-Year Private), Vice President, was responsible for the professional advancement (i.e. training) activities of the Association. With the exception of the one-day New Aid Officer Training that was held on the Sunday prior to the annual conference, and the Mid-Level Workshop held on Saturday and Sunday prior to the annual conference, much of his work and the work of the Professional Development Committee occurred in May/June.

The one-day New Aid Officer Workshop held in February was a success with 18 members participating. The two-day Mid-Level workshop was also a success with 26 attendees. The week long New Aid Officer Workshop was held from June 13-18 on the campus of Clemson University in Clemson, SC, with 96 participants – a 30% increase from the prior year. Runan Pendergrast from Bluegrass Community and Technical College served as the curriculum coordinator for the workshop. Six SASFAA members were selected as faculty and represented a cross-section of the

membership and institution types. Assistance during the week was provided by the lending community and a U.S. Department of Education training officer.

Partly to save costs and partly to experiment with an idea that had been discussed before, the Mid-Level Workshop was offered as a pre-conference event at the Annual Conference in February. In order to accomplish this, the time frame had to be reduced from 3 days to 2 days and the curriculum modified accordingly. This format seemed to work well, but it is difficult to tell if this is a success because of other factors. It is difficult to determine if we would have had more participants if it had been a separate event (not a pre-con) and it is difficult to know how much a factor the location of Louisville had on attendance. Generally, this event has been held in a more central location of the SASFAA footprint. In any regard, Vice President Kim Jenerette and Curriculum Chair Janet Jones are to be commended for their work on this workshop.

### **President-Elect**

Sandy Neel (Tennessee, 4-Year Public) served as the SASFAA President-Elect. Her responsibilities during the year included:

- Served as an alternate voting representative to the NASFAA Board of Directors and provided reports of NASFAA activities to the SASFAA Board and to the membership.
- Conducted an orientation session for the state presidents-elect prior to the February SASFAA Conference.
- Made preparations for the 2010-11 year.

In preparation for 2010-2011, she became more familiar with the SASFAA Policy and Procedures Manual, promoted the 2011 SASFAA conference at this year's conference in Louisville, promoted volunteerism and updated the SASFAA volunteer form, selected committee chairs, and assisted committee chairs in selecting members to serve on their committees. The contract for the Fall meeting of the SASFAA Board was finalized. Sandy has selected an excellent, experienced Board for 2010-2011, and will lead us in the next year appropriately and effectively.

### **Secretary**

Brad Barnett (Virginia, 4-Year Public) completed the second year of his two-year term as SASFAA Secretary. His responsibilities and accomplishments for the year included:

- Updated SASFAA stationary for 2009-2010.
- Reviewed the Policy and Procedures Manual for corrections and made necessary revisions throughout the year.
- Worked extensively on the maintenance of records.
- Sent sympathy and congratulation cards to SASFAA members and others as needed.
- Prepared all Board minutes and posted these to the SASFAA web site.
- Compiled and assimilated all reports for Board meetings and disseminated the compiled reports electronically before each meeting.

Brad kept our records current, and made massive changes to the SASFAA Policy and Procedures Handbook during the year. Brad has taken the remainder of the paper documents from prior years and utilized the resources at James Madison University to scan them onto a disk. As a result of this, all SASFAA documents in possession of the Secretary are now 100% electronic.

### **Treasurer**

Jeff Dennis (South Carolina – 4-Year Private) started his first year of a two-year term as SASFAA Treasurer.

His responsibilities and accomplishments included:

- E-mailed at least quarterly the budget line itemized expense report for each Board member and committee chair.
- Posted to the web quarterly budget reports.
- Assisted in the updating of the Policies and Procedures manual.
- Ensured that Pay-Pal can continue to be used to pay membership fees, conference fees, professional development fees and sponsorship payments.
- Worked with the CPA firm to successfully file the 990 and 990-T for the past fiscal year.
- Paid all bill in a timely manner
- Utilized QuickBooks on the web to allow the Budget Chair and President to have anytime access to budget information or fund information.

The job of the Treasurer is a voluntary one and crucial to the long-term fiscal stability of the Association. The hours that are required to perform all of the necessary duties are numerous, especially at peak processing times. Jeff performed her duties accurately and timely.

### **State Presidents**

The state presidents had essentially two goals as they served on the SASFAA Board. These goals included:

- To become an integrated part of the SASFAA Board with vested interest in the leadership and activities of SASFAA.
- To actively report to and involve the nine state's respective membership in the activities and concerns of SASFAA.

This group of state presidents served the Association during a time of transition and uncertainty, but they represented not only their respective states well, they always kept the best interests of SASFAA in the forefront. They very active this year by attending Board meetings, having a better understanding and representing their members within SASFAA and actively communicating their issues and concerns to the President and the Board, and they did it with enthusiasm, humor, and a deep sense of connectedness. The state presidents not only updated the board to issues in their state, but were actively involved notifying their respective memberships of SASFAA events and activities.

The state presidents did provide direction and recommendations on the Board's activities for the year. The state presidents also shared best practices. The group reported that sharing the

information on state issues, such as budgeting and conference activities was useful to them and their state associations. The state president's also provided input for the long range planning committee.

The state presidents recommended:

- State Presidents should continue to be active and included in all future Board activities. Mainly to legitimize the Boards decisions and activities as priorities of the States they represent.
- Continue to see SASFAA as the "NASFAA" for schools in our states that cannot sustain the cost of NASFAA. As well as, being primary conduits of training and professional activities on a level above what individual states can provide.
- Continue to make the Leadership, Management Institute, Mid Level, and New Aid Workshops the best they can be while trying to uphold our primary mission.
- Continue to meet face to face when possible. Meetings provide the conduit for leadership development in SASFAA. Possibly move the November board meeting to a conference call.

And finally, the state presidents reported that they spent a lot of money in Louisville!

### **Conference Committee**

The 47th SASFAA conference, "Racing to the Future: Change, Collaborate and Celebrate," was held at the Louisville Marriott Downtown in Louisville, KY, February 21-24. Brenda Brown (Florida, Grad/Professional - Private) served as chair of the committee. Her committee included individuals from all nine of the SASFAA states and representatives from all sectors of the Association. The conference committee was also supported by a host of Kentucky Association of Student Financial Aid Administrators (KASFAA) members that hosted the Hospitality Suite and provided general assistance. The Conference Committee also checked the list of SASFAA volunteers, and utilized volunteers that were not placed on an official committee.

The committee was tasked with several goals including:

- Determine the training/professional development needs of members, recognizing categorical distinctions among members such as experience, institutional type, and level of responsibility.
- Improve and enhance the annual conference using the reviews and evaluation of previous conferences, as well as current needs of members.
- Present programs and sessions possessing both vitality and relevance for all members.
- Provide a diversity of topics recognizing both the need for regulatory and technical knowledge, as well as the need for skills in management and human relations.
- Recognize and encourage the development of informal "networking" strategies for sharing information and locating job opportunities.
- Offer advanced training programs and seminars for experienced members on unique topics related to financial aid administration after considering whether such activities are geographically accessible, financially feasible, and educationally enhancing.
- Select a committee make-up that represented all sectors, ethnic groups, etc., to provide active participation and new leadership opportunities for members.

The following is a brief summary of the 2010 Conference:

A Mid-Level Officer Training Workshop was held on Saturday and Sunday at this year's conference in lieu of a "stand-alone" workshop. This event was led by VP Kim Jenerette and curriculum coordinator Janet Jones. The conference's opening day on Sunday included a New Aid Officer's one-day Workshop was led by VP Kim Jenerette and curriculum coordinator Runan Pendergrast. Both, the Mid-Level and New Aid Workshops were taught by several of instructors who have had experience teaching these workshops previously. A State Presidents' Workshop was led by President-Elect Sandy Neel, and a "Successful Collaboration in Implementing HEOA Final Regulations" workshop was coordinated by Legislative Relations Chair, Dave Gelinias.

The Conference opening session included a Kentucky welcome from Chester Priest, KASFAA President and from Colmon Eldridge, III, Executive Assistant to Governor Steve Beshear and an update from NASFAA Interim President and CEO, Joan Crissman. The President's Reception featured SASFAA talent with visits by such notable celebrities as the Blues Brothers and Elvis, as well as food and other activities. Highlights on Monday included our luncheon with a NASFAA update from NASFAA National Chair, Dr. Barry Simmons, Sr. On Tuesday, Jeff Baker from the Department of Education provided a general session on Two Pell's in an Award Year, and the Committee organized our banquet and awards night, congratulating FASFAA and VASFAA on their NASFAA State Awards. Dee Talley received the SASFAA Distinguished Service Award and Senator Lamar Alexander (TN) received a Special Service Award. Wednesday concluded our meeting with a Federal Update from Jeff Baker and Carney McCullough from the US Department of Education.

In addition to the tremendous general session offerings, over 40 concurrent interest sessions were held on a variety of topics categorized as New Aid, Department of Education, Financial Aid Practices, Technology, Industry Issues/Trends, Graduate School Issues and Personal/Professional Development.

### **2020 Committee**

The 2020 Committee was chaired by Dee Talley (Alabama, Four-Year Public). The most obvious action of this committee was changing the name from "Diversity Committee," to the "2020 Committee" in support of President Obama's 2020 Goals for increasing post-secondary graduation rates.

#### Accomplishments and Highlights:

- Submitted 2020 Committee's goals and objectives to SASFAA President for approval.
- Reviewed SASFAA By-laws.
- All 2020 Committee members were approved by the Executive Board.
- Provided a board report at each board meeting.

- Held four conference calls with the 2020 Committee.
- Submitted four newsletter articles.
- Served on the 2010 SASFAA Conference Committee.
- Recommended name change to 2020 Committee; Board approved recommendation at November board meeting.
- Proposed revised text for policies and procedures of the 2020 Committee with recommendation that were adopted at the transition meeting in June.
- Developed two interest sessions on diverse topics for presentation at the annual SASFAA conference.
- Each month posted a diversity “alert” on the SASFAA list serve.
- Created a Veterans’ Affairs Task Force charged with keeping up-to-date on veterans’ students and their issues and schools’ best practices.

### **Electronic Services Committee**

Joe Dobrota (Virginia, Four-Year Private) served as chair for the Electronic Services Committee. The goal of his committee was to support SASFAA’s mission by providing a mechanism for disseminating information to the membership through the SASFAA website and the SASFAA listserv. Electronic Services provided support to SASFAA in many ways for the 2009-2010 year. As is traditionally the case, the largest support area was in development of the annual Conference website. Below is a listing of accomplishments and recommendations:

#### **Accomplishments:**

- Annual Board transition updates on the web
- Routine posting of information to the web
- Development of the annual conference website in conjunction with Conference Chair
- Development and implementation of new Event Module for the Conference. Allowed for real-time updates of conference agenda.
- Development and implementation of the New Aid Officer’s Workshop registration
- Initial discussions with ATAC regarding contract alterations for the future
- Researched new web provider “Wild Apricot” and held conference call with Rick Taphorn (SASFAA Electronic Services chair) about pros/cons of the provider.
- Participated in conference call with KHEAA to discuss possible web hosting opportunities.
- Collaborated with Sponsorship chair to revamp sponsorship information on the web as well as the banner advertisements.
- Researched the possibility of ATAC hosting video. As long as not too large, ATAC would include for free.

#### **Recommendations:**

- As plans exist to possibly move from ATAC as web provider, conduct a survey of membership regarding web-usage to determine needs of membership as part of planning phase.

- Any change in web hosting needs to occur prior to the 2011 Conference Season. Went live in mid-November for the February 2010 conference.
- Consider development of SASFAA FaceBook page.
- Consider use of video in candidate statements for future elections.

### **Budget and Finance Committee**

The Budget and Finance Committee, Chris Tolson (Kentucky, Four-Year Private), and her committee charge was to see that the Association remained financially sound in order to accomplish our mission to establish a community of members who share ideas and professional competencies and experiences, serve the diverse needs of students, parents and institutions. The financial stability of the Association is provided through careful and regular planning and evaluation. The Chair, along with the President and the Board of Directors established an operational budget for 2009-2010 and managed the Association's reserve funds. These reserve funds have been established to protect the Association in the event that the Association is unable to meet its contractual obligations. These funds are invested in long-term CDs and securities and have varying maturity dates. The Association is advised by James A. Mills, Senior Investment Officer, SunTrust Securities Corporation. As these funds mature the chair of the Finance and Audit Committee works to ensure that the best rates are found for reinvestment.

Activities conducted by the Budget and Finance Committee included:

- Completed an annual review of the financial records, which detailed the positive work of our Treasurer.
- Maintained the SASFAA Contract spreadsheet to review ongoing liability and to monitor hotel deposit amounts and due dates.
- Prepared annual SASFAA budget for adoption by the SASFAA Board.
- Worked with the Treasurer and President to adjust budget line items as necessary.

This year was indeed difficult with attendance down at all events except New Aid, and revenue below what we budgeted for. In addition, penalties were paid for not meeting contractual obligations with the Hyatt and Marriott hotels in Louisville. Chris is to be commended for working closely with the treasurer and her assistance in managing our checking and savings accounts to keep positive cash flow, and for moving funds from CD's to money market accounts for necessary liquidity.

### **Legislative Relations Committee**

Dave Gelinis (North Carolina, 4-Year Private) was the chair of the Legislative Relations Committee. This committee was charged with reviewing proposed federal legislation affecting the administration of financial aid, keeping the SASFAA membership updated on pending legislation and to make recommendations to the Board as to possible positions that the Board might take related to legislation. Accomplishments this year included:

- Coordinated a successful pre-conference workshop – Successful Implementation of HEOA Final Regulations – at the SASFAA Conference.

- Participated in several NASFAA legislative conference calls.
- Assisted with the development of several letters to Congress, approved by the Board, and sent by President Reeves.
- Committee contained representation from all nine states.
- Notified SASFAA members via listserv alerts of federal legislative issues.

The year came with unprecedented legislative activity and Dave is to be commended for his work to educate our members and/or call attention to important issues.

### **Membership Committee**

Bryan Erslan (Tennessee, 4-Year Private) served this year as chair of the Membership Committee. He worked with the state presidents to encourage financial aid professionals to join SASFAA. The result of this work was a year-end SASFAA membership of 914.

Of our total membership numbers, 76% of the membership are school representatives, 13% are lender/servicer/guarantor members, and 11% were government employees, consultants or otherwise not specified.

### **Newsletter**

The objective of the Newsletter Committee and the Newsletter Editor, Deborah Clark (Georgia, 2-Year Public), was to disseminate information of interest to the financial aid community and to publish an online newsletter four times a year. The work of this committee involved the assistance of the state newsletter chairs to obtain information for publication from the state. In addition, articles were submitted by the Executive Board members, committee chairs and liaisons. SASFAA members were also encouraged to provide articles for publication. The editor worked closely with the Dewey Knight, chair of the Sponsorship Committee, to ensure advertisements were received timely for placement in the newsletter.

The following is a summary of activities for the year:

- The 2009-2010 SASFAA Newsletter Committee was established with representation from eight states in the SASFAA region and was comprised of two returning members and six new members.
- The Newsletter Committee established goals and objectives to meet the bylaws, mission statement, long range plans, and GAP recommendations for 2009 – 2010.
- The newsletter schedule and guidelines were established and disseminated via email and the SASFAA website.
- Each edition included a Message from the President, Board member reports, Committee Reports, articles of interest from the membership, and Movers and Shakers to keep the membership up to date.
- “Newsletter Ticklers”-- An article from each newsletter was referenced in a communication sent to the membership as each issue was published to encourage and maintain interest in the newsletter.

- State newsletter articles and pictures that may be of interest to the region were solicited (and received) from state representatives.
- The Newsletter Chair, with the President's approval, wrote an article recognizing FASFAA and VASFAA for their NASFAA State Award.
- The Newsletter Chair obtained a commitment from a presenter at the annual conference to submit an article for the newsletter. Ms. Amy Foster presented the session entitled Dealing with Disabilities – Daily Challenges of Amy Foster.
- The Newsletter Chair made a concerted effort to highlight articles of interest/movers and shakers from each state. Several states provided submissions for the winter and spring editions of the newsletter.

### **Site Selection Committee**

The purpose of the Site Selection Committee was to identify sites that will provide a suitable physical environment for conferences, committee meetings, Executive Board meetings and professional development workshops. Janet Sain (North Carolina, Lender) chaired this committee.

Major accomplishments of the Site Selection committee included:

- Completed contract re-negotiations for Transitional Board meeting at The Don in St. Pete Beach, FL for lower room rates and lower room block while keeping concessions the same.
- Completed contract re-negotiations for SASFAA 2011 in Jacksonville, FL at the Hyatt.
- Completed contract renegotiations for SASFAA 2010 at the Marriott with lower room block while keeping concessions the same.
- Completed contract negotiations for the NAOW at Clemson University.
- Completed contract negotiations for the Fall Executive Board meeting in MS at the Hilton Garden Inn.
- Completed site visits for possible future NAOW in NC and SC.

Janet had her work cut-out for her this year, as contracts were negotiated and re-negotiated. Thanks to her expertise, SASFAA managed to save thousands of dollars with several hotels.

### **Sponsorship Committee**

Dewey Knight (Mississippi, 4-Year Public) chaired the Sponsorship Committee for 2009-2010. The year was a bit tumultuous with many of our traditional sponsors exiting the business or choosing to not sponsor pending the outcome of legislation.

Listed below are the Committee's accomplishments:

- The Chair served as a member of the budget committee.
- The Chair served as an ex-officio member of the conference committee.
- The Chair was appointed as a member of the Budget Review Task Force.
- The Chair spoke to members of the current Board, lender staff and other regional and state association vendor/sponsor chairs to assess the current state of involvement by vendors/sponsors on normal Association activities and future endeavors.

- Chair presented a restructured vendor/sponsor (exhibitor) policy which included a new pricing structure for conference exhibiting, program advertising, workshop sponsorship and advertising and web banner advertising, which included a discount for first-time sponsors.
- Contacted and received bids from drayage companies and presented that information to President Reeves, Brenda Brown, Conference Chair and Janet Sain, Hotel Liaison. It was determined that one company was considerably more desirable and that contract was given to President Reeves for his signature.
- Chair created several email solicitation lists of primary contacts for possible sponsors.
- Chair publicly thanked each exhibitor at a luncheon session at the annual conference.

Thanks to Dewey for his work on sponsorship. His efforts allowed SASFAA to come much closer to meeting sponsorship revenue goals in a very tough year than would otherwise have occurred.

### **Special Appointee – Long Range Planning**

SASFAA's current 5-year plan runs through the end of the 2010-11 year. In order to develop and implement the next 5-year plan, Ron Day (Georgia, 4-year Public) was appointed to chair the committee in charge of developing the next plan.

The LRP Committee began the 2009-2010 year with a face-to-face meeting October 18 – 19, 2009 in Louisville, KY. The following was accomplished at the meeting:

- Review of previous LRP
- Review all SASFAA documents
  - By-Laws, P & P Manual, State LRPs, GAP Reports, Previous Membership Survey
- Other Regional LRPs
- NASFAA LRP

The 2006-2011 SASFAALRP was divided amount the members for review.

On December 7, 2009, the LRP had a conference call to discuss the review and possible suggestions. It was deemed necessary to look at the following sections in great detail:

- Professional Development
- Organizational Structure
- Finances

Members reported on specific suggestions. One major suggestion was the proposal to the SASFAA Board for the creation of a "Budget Forecast Group." This group (which was voted on by the Board in Feb. 2010) major responsibility is to review and offer suggestions in an effort to balance the budget within 2 years – that does not rely on using the Association's financial reserves. This group has met via teleconference multiple times.

At the SASFAA Annual Conference, February 21 – 24, 2010, the LRP hosted three “listening sessions”:

- Executive Board – moderated by Barbara Miller, EASFAA President
- Open Forum with all membership
- SASFAA Past Presidents

A set of questions was predetermined and asked to each group. Suggestions and comments were recorded and reviewed by the LRP. The information was utilized to construct the membership survey.

The Membership Survey was sent to members in May 2010. A total of 952 members were provided the opportunity of completing the survey. We had 302 responses. The information has been compiled and will be utilized by the LRP to make preparations for revising the LRP for 2011-2016.

### **Agency and Lender Liaisons**

Brenda Paganelli (Mississippi, Agency) was the liaison to the various state agencies and Chuck Sanders (South Carolina, Lender) was the liaison to all of our lender partners for 2009-2010. Their responsibilities for the year included keeping the board updated regarding current issues within the profession that affect our lender and agency partners and updating the SASFAA members on regulatory/statutory issues and changes through newsletter articles and the listserv.

Both liaisons were resources for the Board throughout the year, and I appreciate their work and perspectives brought to our meetings and discussions. Chuck’s insights to the issues facing the FFELP industry were very beneficial to the board and Brenda’s collection of information from the various state agencies, provided insight as well.

### **Summary**

As mentioned, this brief summary of the activities of your officers, state presidents, committee chairs and liaisons gives you some ideas of the many tasks and activities that were accomplished. This group of individuals worked exceptionally hard on your behalf this year and represented your Association well. There is no doubt in my mind that SASFAA is a strong regional Association, and that we come together because of our common interests and because we believe in our mission.