

SASFAA Annual Report

2005-2006

**Southern Association of Student Financial Aid
Administrators, Inc.**



June 2006

**Prepared by Guy Gibbs
SASFAA President, 2005-2006**

In Compliance with SASFAA Bylaws, Article VII, Section 1

SASFAA Annual Report

2005-2006

The annual report is a review of the activities of the officers, state presidents, committees and liaisons during 2005-2006 and serves as the President's report to the SASFAA membership. This report summarizes the goals established by the Board, committee chairs and liaisons highlight some of the results of the Association's activities and achievements.

President

When the 2005-2006 SASFAA Board, committee chairs and liaisons met in transition on June 11, 2005, I outlined several goals for the day and the year:

- That each participant better understand SASFAA and our roles for 2005-2006.
- That each participant become familiar with the SASFAA Policy and Procedure Manual, the governance and planning document, the long-range plan and the implications they hold for setting of goals, objectives and the work that we are to accomplish during the year.
- That we understand the board and committee structure and have a clear understanding of our duties and roles within that structure.
- That we understand the importance of establishing individual, committee and liaison goals and objectives for the year.
- That we recognize and understand the importance of committees comprised of a diverse membership: ethnicity, gender, sector and institution type, as well as state representation.
- That we understand our fiduciary responsibility and the role that each of us plays in ensuring the continued financial health and stability of SASFAA.

I went on to say, *"The key for 2005-2006 is that we respect each other and the views that each of us brings to the table even when we might share a different perspective. My expectations are that you will be engaged and involved in ensuring the continued success of SASFAA. We have a historic past for our guide and a future that is bright and unlimited except for the barriers that we place in our way. I look for your insight into how we might better serve our membership, how we might engage the membership to become more involved in SASFAA, and how we as an association might better serve our students and families."*

I feel very confident when I say that the charge given on July 11 was embraced by the Board, committee chairs, and liaison. As you read through this report you will see the many activities and accomplishments summarized. Several of my specific goals for the year that were carried out by various committees were:

- Planning for a successful Leadership and Strategic Planning Summit. This was held in Charlotte, NC, in November 2005.

- Planning for the 43rd Annual Conference. The “*Financial Aid Unmasked*” conference was held in Greensboro, NC, in February 2006. It was a huge success.
- Planning for the New Aid Officer Workshop to be held at the University of North Carolina at Asheville in June 2006. At the preparation of this report the workshop is oversubscribed.
- Planning for the Mid-Level Workshop to be held at Furman University in Greenville, SC, in June. This is a cooperative endeavor with the Southwest Association of Student Financial Aid Administrators (SWASFAA).

Last year we had over 125 volunteer forms submitted. Unfortunately not everyone that submitted a volunteer form could be accommodated on a committee. There were 80 volunteers appointed to committees for 2005-2006. I would like to thank everyone that submitted a volunteer form to know how much I appreciate your interest in and support of SASFAA. I have provided the names of those individuals not selected for a committee to the incoming President-Elect, Brent Tener, for his review. To those that served on committee this year a sincere thanks. You did a great job!

I would like to thank the entire SASFAA membership for the opportunity to have served as President of the Association in 2005-2006. If you have questions about any of the activities conducted by SASFAA please do not hesitate to contact any member of the SASFAA Board of Directors. I can be reached at 703-323-3085 or at ggibbs@nvcc.edu.

Immediate Past President

Janet Sain (North Carolina, Proprietary/Lender) had a very successful and productive year as Immediate Past President. In this position she was responsible for:

- Nominations and elections
- Professional recognitions and awards
- Compilation of the Governance and Planning (GAP) report

The Nominations and Elections Committee was able to put together a dual slate of candidates for the offices of President-Elect, Vice President and Secretary. The candidates were from five of the nine SASFAA states, male and female and comprised of minority representation. Lisanne Masterson of Brevard College in North Carolina was elected to the position of President-Elect, Sandy Neel of the University of Tennessee at Martin was elected to the position of Vice President and Deborah Byrd of Calhoun Community College in Alabama was elected to a two-year position as Secretary.

Awards were presented at the annual conference:

- SASFAA Distinguished Service Awards were presented to Dave Gelinas and Clark Aldridge. Both are long-time contributing members of SASFAA. Dave is currently hold the position of National Chair of NASFAA and is a Past President of SASFAA. Clark is also a Past President of SASFAA and continues to contribution to the Association as the current chair of the Finance and Audit Committee.

- After long-time service to the financial aid profession and SASFAA, a Honorary Lifetime Membership was presented to Curtis Whalen who retired during the year from the University of North Carolina at Charlotte. Curtis is also a SASFAA Past President and has contributed much to the success of SASFAA.
- Special appreciation awards were given this year to two individuals from South Carolina. Both of these individuals have made contributions to SASFAA over the years and the Board of Directions was pleased to recognize their contributions. The awards went to Dr. William “Bill” Mackie who has retired from the South Carolina Student Loan Corporation and to Lynda Sayer a recent retiree from Furman University.
- The Executive Board also submitted a nomination to NASFAA for the NASFAA Distinguished Service Award. This award recipient will be recognized at the NASFAA conference to be held in Seattle in July. The award will be presented to the recipient by National Chair Janet Dodson at the SASFAA Annual Conference in Nashville in February 2007.
- Karen Koonce, the 2006 recipient of the NASFAA Distinguished Service Award was presented the award by Dave Gelinis at the conference held in Greensboro in February.

The GAP committee met in May to compile the annual report. That report will be present to the SASFAA Board in June. The GAP report will be available for review on the SASFAAA website following the June board meeting.

Vice President

Tolly Tollefson (North Carolina, 4-Year Public) as Vice President is responsible for the professional development 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, much of her work occurs in June.

The one-day New Aid Officer Workshop held in February was a success. The week long New Aid Officer Workshop is scheduled for June 13-23 on the campus of the University of North Carolina at Asheville. This is the second year that the workshop has been held at this location. The workshop can accommodate 125 participants and by mid-May registration was closed. Chip Quisenberry of Ozark Community College in Alabama is the curriculum coordinator for the workshop. Twelve SASFAA members have been selected as faculty and represent a cross-section of the membership and institution types. Assistance during the week will be provided by the lending community and a U. S. Department of Education training officer.

The Mid-Level Workshop is held in conjunction with the Southwest Association of Student Financial Aid Administrators (SWASFAA). SASFAA is the host this year and the three-day workshop will be held June 25-27 at Furman University, Greenville, South Carolina. The workshop is scheduled for a maximum of 60 participants. Bob Godfrey of the University of South Carolina is the curriculum coordinator.

President-elect

Brent Tener (Tennessee, 4-Year Private) is the SASFAA President-Elect. Among his responsibilities during the year were:

- Act as parliamentarian to the Board
- Serve as an alternate voting representative to the NASFAA Board of Directors and to provide written reports of NASFAA activities to the NASFAA Board and publish reports as needed
- Represent SASFAA at state meeting in the absence of the President
- Conduct an orientation session for state presidents-elect
- made preparations for 2006-2007

In preparation for 2006-2007 he has become more familiar with the SASFAA Policy and Procedures Manual, promoted the 2006-2007 SASFAA conference at this year's conference in Greensboro, promoted volunteerism, selected committee chairs, and assisted committee chairs in selecting members to service on their committees.

Brent has done an outstanding job this year and in planning for 2006-2007 and will lead the transition activities for the new SASFAA Board, committee chairs and liaison on June 10.

Secretary

Sandy Neel (Tennessee, 4-Year Public) is completing the last year of her two-year term as SASFAA Secretary. In addition to her responsibilities of taking minutes, preparing a draft of the minutes for review two-weeks after a board meeting, presenting the minutes for approval at the board meeting, working with the hotel staff in preparing for board meetings, food, etc., Sandy was tasked with one additional and important goal this year. She was asked to review and recommend updates to the SASFAA Policy and Procedures Manual. This is a specific task for the Secretary; however, a complete review had not been taken in a couple of years and there were sections of the manual they were woefully out of date. She performed this task in coordination with special Appointee Susan Little and committee.

Final action taken by the SASFAA Board related to the recommendation of this committee will be found in the minutes of the June 9, 2006 board meeting. The minutes will be posted to the SASFAA website.

Treasurer

Heather Boutell (Kentucky, 4-Year Private) is in her first year of a two-year term as SASFAA Treasurer. She transitioned into this role very quickly and has been an invaluable member of the Board. Heather was tasked with several goals. They included:

- E-mail at least quarterly the budget line itemized expense report for each board member and committee chair
- Assist in the updating of all policies and procedures manual
- Determine the cost of on-line payment and make a recommendation to the Board

The job of the Treasurer is a voluntary one; however, the hours that are developed to this position are many. In order to function effectively as Treasurer it was necessary to transfer the SASFAA accounts from Bank of America to Fifth Third Bank. This transition and the online banking capabilities went relatively smoothly. The issuance of credit cards resulted in some issues that were revolved with the bank and did not involve any additional expense to the Association.

Heather has worked with special Appointee Susan Little and others to review and update the SASFAA Policy and Procedures Manual and the Guide to Financial Management. Their recommendations will be made to the Board of Directions in June. Other recommendations that will be brought before the board include approval to integrate credit card PayPal payments online, start the 2006-2007 treasurer database from scratch and not attempt to carry forward data that may no longer be necessary and purchase another license of Quick Books for the Chair of the Finance and Audit Committee.

The budget approved by the Board for 2005-2006 was \$481,463. At mid-May the revenue generated is \$501,827.91. The bottom line is that the Association's finances are strong and in order.

Final action taken by the SASFAA Board related to the recommendation of this committee will be found in the minutes of the June 9, 2006 board meeting. The minutes will be posted to the SASFAA website.

State Presidents

The state presidents were asked to develop goals for the year. This is the first time that they have been asked to do so and I was very pleased that they wished to become more involved the association governance. Their goals were:

- 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.

I am happy to report that their goals were met. The State Presidents have been very active this year by attending board meetings, better understanding and representing their members within SASFAA and actively communicating their issues and concerns to the President and the Board. A better line of communication was opened this year and I anticipate that to continue in the future.

This is very evidenced by action taken after the terrible hurricane season and the devastation that it brought to Mississippi, Alabama and to a lesser extent in Florida. The state presidents worked tirelessly with the President to respond to the needs of colleagues in the affected states.

Other ways in which the state presidents have been more involved this year include notifying their respective membership of upcoming SASFAA Board Meetings and soliciting comments regarding questions or concerns for the Board; reporting back to their membership developments resulting from

these board meeting; encouraging participation in SASFAA conferences and sponsored training; and encouraging their membership to volunteer for SASFAA committees. While these activities have been carried out by state presidents in the past, this was the first year that special goals and objectives were outlined for all nine individuals to support and carry out.

Conference Committee

The 43rd SASFAA conference was held at the Sheraton Four Seasons and Khory Conference Center from February 12-15. The theme of this year's conference was "*Financial Aid: Unmasked*" and represented how we could unmask the financial aid process for students and families, the federal regulations and interpretations, our offices at our institutions, and the multitude of masks we wear professionally and personally. The Chair of the Conference Committee was Lianne Masterson (North Carolina, 4-Year Private). Her committee was staffed by individuals from all nine of the SASFAA states and representative from all sectors of the Association. The conference committee was also supported by a robust group of North Carolina Association of Student Financial Aid Administrators (NCASFAA) that hosted the Hospitality Suite.

The committee was tasked with several goals:

- To create a program which included interest sessions to accommodate all SASFAA members, including HBCUs, Graduate/Professional Programs, Lenders/Guarantors/State Agencies, etc.
- Exhibit fiscal responsibility by staying with the approved budget.
- Select a committee make-up that represented all sectors, ethnic groups, etc., to provide active participation and new leadership opportunities for members.

The committee provided for diversity not only in institution or agency type but also by years of experience in the professional, gender, race, creativity and personality, and an opportunity to serve SASFAA in a high profile role and leadership development. There had been complaints in years past that the same individuals were always involved and that there was not an opportunity for developing new leaders. That concern was heard and reacted to very positively by this committee chair. There was only one returning Conference Committee member from the prior year. As a result there were many new faces to this committee and to SASFAA committees in general.

There were 867 members registered for the conference. The budget approved for the conference was \$200,000 but I am happy to report that the conference came in under budget at approximately \$192,000. The program consisted of an opening session on Sunday afternoon followed by a President's Reception, two general sessions during the conference one of which was a Federal Update, a Pathways to Leadership Luncheon sponsored by the Diversity Committee and 53 concurrent sessions. The banquet and awards presentation occurred on Tuesday night and the conference concluded with a presentation by SASFAA's own Dave Gelinis, NASFAA National Chair and Dr. Dallas Martin, NASFAA President.

As I indicated 867 individuals were registered for the conference. Those in attendance were encouraged to complete an on-line evaluation and 227 responded by doing so. What was gleaned from those 227 responses?

- 33.4% - 4-Year Public
- 24.6% - 2-Year Private
- 18.9% - 2-Year Public
- 3.5% - Graduate/Professional
- 1.3% - Private Career
- .4% - 2-Year Private
- 17.4% - Lender/Vendor, State Agency, Guarantor, Other
- 85.9% - Not their first SASFAA conference
- 64.7% - Had over 11 years of financial aid experience
- 17.6% - Had between 6-10 years of financial aid experience
- 17.5% - Had between 0-5 years of financial aid experience
- 47.5% rated interest sessions at 5 (excellent); 36.1% at 4; 8.8% at 3 (average); 1.2% at 2 or 1 (poor); 4.4% no response
- 34.3% rated general sessions at 5; 22% at 4; 11.4% at 3; 3.9 at 2 or 1; 25.9% no response
- 35.2% rated special events at 5; 9.6% at 4; 3.5% at 3; 2.6% at 2 or 1; 45.8% no response
- 62.9% rated the site and facilities at 5; 24.2% at 4; 6.1% at 3; .8% at 2 or 1; 4.8% no response
- **50.2% gave an overall rated of 5 (excellent); 44% at 4; 5.2% at 3 (average). .4 a 2 and no one rated it as poor.**
- **97.3% (221) indicated the conference met their professional needs; 2.2% (5) indicated that it did not**
- **96.9% (220) indicated the conference met their expectations; 2.6% (6) indicate a no**

From these responses it is evident that the Conference Committee met the challenges that they put forth as their goals. As with any conference of this size, with the myriad on institutions that make up the membership, with varying levels of experience in financial aid, etc., it is impossible to meet the expectations of all participants; however, I believe the committee can be proud of the work that they did and this is supported by the evaluations received. I commend each and every one of them for their commitment to making the 43rd annual conference one to remember.

Diversity Committee

The Diversity Chair was Cruzie Lucero (Tennessee, 2-Year Public). She and her committee accepted my challenge to revisit the whole diversity issue and to define diversity more globally; to have a broader perspective that would promote awareness among the membership and outside audiences on issues relevant to our culturally diverse financial aid administrators and student populations. The committee did this by:

- Looking at different ways to lead the membership in understanding that diversity is not only a racial issue but encompasses a myriad of other possibilities.
- Seeking avenues for the Association to examine older ideas but be open to new ideas and the definition of diversity in today's world.
- Considering diversity not only from how we deal with our peers but also in learning how to deal with the diverse student bodies that we assist as financial aid professionals.

The committee worked toward achieving their goals by working with the Conference Committee to ensure that there were sessions at the conference that dealt issues of diversity. They worked to plan personal and professional development opportunities that embraced sound principles and practices of aid administration. Included in this were a number of concurrent session, a general session and a leadership luncheon.

I believe that we as individuals and as members of the financial aid profession must examine our own prejudices and be willing to adapt and accept differences among us. We must be willing as individuals and as an association to promote equal benefits and representation of all groups of people or we fail ourselves, our institutions, our students, their parents, the community as a whole and more importantly our profession.

Electronic Services Committee

Erik Melis (Virginia, 4-Year Public) has chaired the Electronic Services Committee for a number of years and we appreciate his service to the Association. Erik will move to the voting side of the Board next year as he assumes the presidency of the Virginia association.

Erik worked extremely well with the Board this year to continue to enhance our use of technology as an Association. As he has indicated, his goal, and that of the committee, is to support SASFAA's mission by providing a mechanism for disseminating information to the membership through the SASFAA website and the SASFAA Listserv.

Significant activities and accomplishments by electronic services include but are not limited to:

- Updating of the SASFAA website through ATAC.
- Setting up the 2006 conference mini site and providing ATAC with periodic updates as they were made available by the Conference Committee.
- Working with ATAC and Sponsorship Committee to get sponsorship application available via web and to post new banner as for sponsors.
- Working with Nominations and Elections to set-up online voting both at the conference site and by absentee voting
- Working with ATAC and the Membership Chair to get membership information updated.
- Providing updates to ATAC for SASFAA web site including newsletters, budget updates, updates to member state information, calendar updates, updates to form, minutes, etc.

The work of this Chair for 2006-2007 will be to continue to work on future web enhancements and to get the online payment functionality added to the SASFAA website.

Finance and Audit Committee

In order to the Association to accomplish its mission to establish a community of members who share ideas and professional competencies and experiences, serve a more ethnically and effectively the diverse needs of students, parents and institutions, the Association must be financially sound. It falls to the Chair of the Audit and Finance Committee, Clark Aldridge (Alabama, Lender/Gurantor), and his committee this responsibility.

The financial stability of the Association is provided through careful and regular planning and evaluation. The Chair worked tirelessly with the President and the Board of Directors to establish an operational budget for 2005-2006. The operating budget that was adopted by the Board of Directors for July 1, 2005 through June 20, 2006 was \$481,463.

In addition to the operating budget, the Association currently has reserve funds of \$510,000. 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 will work to ensure that the best rates are found for reinvestment.

It is anticipated that action will be taken during the June board meeting to reinvest and to purchase an additional security. Final action taken by the SASFAA Board related to the recommendation of this committee will be found in the minutes of the June 9, 2006 board meeting. The minutes will be posted to the SASFAA website.

Legislative Relations Committee

Bill Spiers (Florida, 2-Year Public) is the Chair of the Legislative Relations Committee. This committee is charged with reviewing proposed Federal legislation affecting the administration of financial aid, keep 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 this legislation. Where appropriate SASFAA provides legislators and public policy officials with SASFAA's views on reauthorization and the issues that will have a positive impact on students' ability to afford a college education.

The chair has been assisted by several members of this committee this year in keeping the community updated on talking points for reauthorization and information they can use to respond to legislative issues. The committee also reviewed the SASFAA Legislative Guide. Hopefully the work of this committee has provided the membership with information needed on legislative issues and allowed them to respond to issues as appropriate.

Membership Committee

Juanita Russell (Mississippi, 4-Year Public) has worked tirelessly this year as Chair of the Membership Committee. She has worked with the state presidents to encourage financial aid professionals to join SASFAA. The result of this work is the largest numbers of SASFAA members in history of the Association. The last reported count was 1,544. This number represents membership from 502 institutions.

Membership by State:

- 81 – Alabama
- 285 – Florida
- 187 – Georgia

- 96 – Kentucky
- 71 – Mississippi
- 233 – North Carolina
- 114 – South Carolina
- 135 – Tennessee
- 193 – Virginia
- 149 – Out of Region

Membership by Institute Type:

- 274 – Not Specified
- 26 – Other
- 113 – 2-Year Public
- 380 – 4-Year Public
- 14 – 2-Year Independent
- 263 – 4-Year Independent
- 21 – Proprietary (Technical/Trade)
- 3 – Health Related/Nursing
- 23 – Graduate/Professional
- 43 – Government Agency
- 65 – Guaranty Agency
- 316 – Lender

Membership by Ethnicity:

- 367 – Not Specified
- 6 – Other
- 2 – American Indian/Native American
- 11 – Asian/Pacific Islander/Filipino
- 283 – Black/African American
- 40 – Hispanic/Chicano/Mexican American/Latino
- 835 – White/Caucasian

Membership by Gender:

- 463 – Male
- 1,063 – Female
- 13 – Not Specified

Newsletter Committee

The objectives of the Newsletter Committee and the Newsletter Editor, April Kendrick (Kentucky, 2-Year Public), is to disseminate information of interest to the financial aid community and to publish an online newsletter four times a year: October, December, April and June. The work of this

committee has involved the assistance of the state newsletter chairs to obtain information for publication from the state. In addition articles have been submitted by the Executive Board members, committee chairs and liaisons. The SASFAA membership has also been encouraged to provide articles for publication.

The editor has worked closely with the Keith Reeves, Chair of the Sponsorship Committee, to ensure advertisements were received timely for placement in the newsletter.

Site Selection Committee

The purpose of the Site Selection Committee is to identify sites that will provide a suitable physical environment for conferences, committee meetings, Executive Board meetings and professional development workshops. Ron Gambill (Tennessee, Guarantor) chairs this committee.

Conferences sites and contracts have already been signed for 2007 in Nashville, Tennessee and 2008 in Arlington, Virginia. The rotation would have had the 2009 conference meeting in Mississippi; however, because of the hurricane damage along the Gulf Coast no suitable facilities are available in Mississippi at this time. South Carolina was identified in the rotation order. The chair visited several sites in South Carolina and submitted his recommendation to the NASFAA Board. The Board voted to have South Carolina Association of Student Financial Aid Administrators (SCASFAA) host SASFAA in 2009 at the Sheraton Myrtle Beach Convention Center, February 6-10, 2009.

In addition contracts have been signed for SASFAA Board Meetings. The Board will meet in Nashville, August 4-6, and in Orlando, November 3-5. The Conference Committee will meet August 5-7 and October 6-8 in Nashville. The chair will be asked to look at potential sites for the Nominations and Elections and Awards Committee. This committee will meet October 6-8.

Sponsorship Committee

Keith Reeves (South Carolina, 4-Year Public) chaired the Sponsorship Committee for 2005-2006. He has done an outstanding job in soliciting support for the activities of the Association this year. The result of this work includes:

- An increase in the number of sponsors
- An increase in the amount of sponsor support
- An increase in the number and amount of banner advertisements on the SASFAA website
- An increase in the number and amount of advertising support for the newsletter

Membership dues and conference registration fees alone do not provide sufficient revenue streams to support the activities of the Association. The outstanding support that SASFAA receives from its vendors and sponsors provides the additional revenue required to meet general association expenses, support for the annual conference, the New Aid Officers' Workshop, the Mid-Level Workshop and the other activities that are supportive of the membership.

The Board is very appreciative of the support received. As of June 2, 2006 sponsorship and advertising support was \$226,610. This represents the largest amount of sponsorship and advertising support ever received by the Association.

Special Appointee – Archives and Foundation

Susan Little (Georgia, 4-Year Public) accepted an appointment by the President with a request to look at two specific issues: the current status of the SASFAA archives and the possible formation of a SASFAA foundation to oversee its scholarship funds.

For a number of years the SASFAA archives have been housed in the offices of the South Carolina Student Loan Corporation. There has been some concern that the archived information may not be completed and that it should be made available to the membership via the SASFAA website.

The committee made a complete review of all materials archived at the South Carolina Student Loan Corporation, organized and categorized the materials and made a search for missing files. The Board has been encouraged to place a general call for SASFAA materials that should be added to the archived materials currently on hand.

The chair will recommend that the Board follow-through on having all materials archived electronically. There will be a recommendation at the June Board meeting to move forward to determine the cost, identify the process and vendor that will make the archives available to the membership.

The committee has looked at the possibility of SASFAA establishing a foundation to control its scholarship funds. A foundation could be used enhance the financial management of the Association in order to maximize the income of funds which are dedicated to scholarship as well as other funds. The committee found very few resources in the financial aid community using the foundation approach to funds management.

The committee recommended, pending Board approval, the treasurer, chair of the finance and audit committee and the past president be involved in carrying this task forward.

Final action taken by the SASFAA Board related to the recommendation of this committee will be found in the minutes of the June 9, 2006 board meeting. The minutes will be posted to the SASFAA website.

Special Appointee – Long Range Plan

Carol Mowbray (Virginia, 2-Year Public) continued as a special Appointee in 2005-2006 to conclude the work of on the Long-Range Plan (LRP) that was started the previous year. SASFAA's first Long-Range Plan was approved in February 1996 and covered the period 1996-2000. The second plan was updated and approved for 2001-2006. Janet Sain as president appointed a committee to begin the planning process for updating the LRP for 2006-2011. That committee analyzed, reviewed and proposed changes to the current plan. The purpose of the review of the plan was to recommended changes to eliminate redundancy, address omissions, make the goals more explicit

and the objectives more concrete. An important component of the work on the committee involved a membership survey and review of long-range plans of other regional and state associations.

The 2006-2011 LRP was presented to the SASFAA Board of Directors and approved in June 2005.

Even though the plan itself was approved, activity related to the LRP continued this year and included a Leadership and Strategic Planning Summit held in Charlotte. Forty SASFAA leaders and constituent members of the Association met in November 2005. Several of the outcomes that were deemed significant and that may warrant action in the future are:

- Creation of a *Rising Young Professionals Scholarship*
- Involve New Aid Officers' Workshop participants in a structured follow-up
- Bring SASFAA training into the states
- Acknowledge, track and monitor volunteers
- Involve former states presidents at a greater level
- Reassess SASFAA President's role with the states
- Reassess membership alternatives

The summit also allowed participants to engage in activities and dialog designed to develop the core values for the Association. The draft of the core values and the recommendations and action items are to be presented to the SASFAA Board at the transition meeting in June.

Final action taken by the SASFAA Board related to the recommendation of this committee will be found in the minutes of the June 9, 2006 board meeting. The minutes will be posted to the SASFAA website.

Agency Liaison

Mike Hawkes (Virginia, Agency) was the Liaison to the various state agencies in 2005-2006. Mike established goals for the year and achieved each of them.

- Provide NCHelp and NASSGAP updates to the SASFAA Executive Board.
- Expand the outreach to more agencies (both loan and grants/scholarships) in the SASFAA region.
- Propose revisions to SASFAA Policy and Procedures Manual to clarify which agencies should be solicited for reports.

Accomplishments this year included identifying both grant/scholarship and guaranty agencies for each SASFAA state. Slowly over the years contact has been lost with many of these entities but there now appears to be a renewed interest in mutual contact between these agencies and SASFAA. Each of the designated state guaranty agencies were asked to provide reports to the Board and by and large have done so this year.

Lender Liaison

Paul Mittlehammer served as the Lender Liaison in 2005-2006. Paul's goal is to bring lender concerns to the Board for consideration and appropriate action as well as to relay Board actions affecting the lending community. This is a particularly important role to play since SASFAA depends significantly on sponsorship support to conduct its activities.

U. S. Department of Education Representative

Unfortunately the U. S. Department of Education has retreated from allowing their training personnel to be an active participant in regional association activities such as board meetings. While the training officers are still permitted to visit with state associations to provide updates at training at conferences, attendance at other types of regional activities is no longer supported. The SASFAA Board missed the opportunity of having Greg Martin, Training Officer for Region III, participate this year. We were fortunate that Greg was able to join us in Greensboro for the board meeting prior to the annual conference and was a presenter for a number of sessions during the conference. We do not see the Department relaxing their restrictions and a representative attending future board meetings.

Summary

As I indicated this is but a brief summary of the activities of the elected board, state presidents, committee chairs and liaisons this past year. The individuals that comprise this group have worked together and tirelessly for SASFAA this year. They are to be commended. This was a banner year for SASFAA. Won't you volunteer and become a part of this great experience in future years?