SASFAA Executive Board Meeting

Transition Meeting

The Don CeSar

June 10, 2005

**CALL TO ORDER**

President Janet Sain called the meeting to order at 8:57 a.m.

**WELCOME**

President Sain welcomed everyone to the Don CeSar. President Sain thanked the following for providing food, hospitality suite, and entertainment:

Edsouth/Edamerica , Dee Tally’s son for entertainment, Mike O’Grady and College Loan Corp, Craig Anderson and Chase/Bank One, Southwest Student Services, and Next Student.

Janet welcomed special guests Rick Renshaw, SWASFAA President-Elect and Dave Gelinas, NASFAA National Chair-Elect.

**CHANGES TO THE AGENDA AND SUBSTITUTE VOTING**

Janet added Carol Mowbray to the agenda

**INTRODUCTIONS**

The following elected board members were present: Janet Sain, President; Guy Gibbs, President-Elect; Ron Day, Past-President; Zita Barree, Vice President; Lester McKenzie, Treasurer and Sandy Neel, Secretary.

State Presidents in attendance were: Heather Boutell, Kentucky; Joanie Walker, Tennessee; Freida Jones, Georgia; Tom Morehouse, Virginia; Chip Quisenberry, Alabama; Betty Whalen, South Carolina; Sharon Oliver, North Carolina; and Laura Diven-Brown, Mississippi

Committee Chairs in attendance were: Karen Fooks, Management Institute; Erik Melis, Electronic Services; Karen Koonce, Finance and Audit; Dee Tally, Diversity, Carol Mowbray, Special Projects; Forrest Stuart, Membership; Ron Gambill, Site Selection; Bill Spiers, Legislative Relations ; Brent Tener, Conference; and April Kendrick, Newsletter Editor.

Liaisons present: Elizabeth McDuffie, Agency, and Jane McNaughton, Lender.

**APPROVAL OF THE MINUTES**

**ACTION: Tom Morehouse moved to accept the minutes of the February Board meeting held at the Peachtree Marriott, Atlanta, Ga. The motion seconded by Ron Day, was approved.**

Dave Gelinas was invited to say a few words.

**REPORTS FROM THE OFFICERS- SEE ATTACHMENT A**

**Past President, Ron Day**

Ron recognized Jane McNaughton and Guy Gibbs for assisting him with the GAP Report

**Recess for Lunch 11:51**

**Reconvened 1:12**

**STATE REPORTS- SEE ATTACHMENT B**

**COMMITTEE REPORTS- SEE ATTACHMENTS C**

**Report from Special Projects Chair Carol Mowbray**

Carol presented the draft History of the Long Range Plan

**ACTION: Guy Gibbs made a motion that the draft History of the Long Range Plan to be included as a part of the Long Range Plan. The motion being seconded by Zita Barree, was carried.**

Carol Mowbray presented to the board a list of participants for the SASFAA retreat planned for November 11 and 12, 2005 in Charlotte, NC.

**ACTION: Betty Whalen made a motion to accept the proposed participants list presented by Carol and her committee. The motion was seconded by Chip Quisenberry.**

Discussion occurred about the committee make up and how people were chosen to participate in the retreat.

**The motion being made and seconded, carried. One Person abstained for the vote.**

**LIASON REPORTS- SEE ATTACHMENT D**

**Old Business**

Karen Koonce stated that changes to the 2004-2005 Budget versus Actual statement were necessary. A CD matured and $20,000 will be reinvested to another CD. To balance the budget line 206 budgeted amount was increased to $264,247.65 to balance to the actual. Line 207 Site Selection was increased to $1464.86 .. Line item 208 was increased to $3782.50, the actual spent.

**New Business**

It was proposed that a credit card be issued for the Conference Chair.

**Action: Heather Boutell made a motion that the Policy and Procedure Manual , section 7.6 Guidelines and Procedures for the Treasurer, be changed to state, “The Treasurer shall secure major credit cards for official SASFAA Business for use by the elected SASFAA Officers (6 cards) and the Conference Chair. The limit on such cards shall be $5,000 per card for the President and Vice President and $3,500 per card for all other card holders.” The motion being seconded by Tom Morehouse carried.**

**Announcements**

Hospitality Suite in room 354 and dinner is at 6:30 at Hurricanes sponsored by Chase/Bank One.

**ACTION: Tom Morehouse made a motion to adjourn the Executive Board meeting. The motion being seconded by Joanie Walker carried.**

Meeting adjourned at 4:16 pm

Respectfully submitted,

Sandra J. Neel, SASFAA Secretary

**ATTACHMENT A**

**EXECUTIVE BOARD REPORTS**

**President Janet Sain’s Report**

**SASFAA Board Report**

**June 2005**

Since the NASFAA Board meeting in November, SASFAA has had some great accomplishments. On December 10-12, 2004, SASFAA held its 2004 Management Institute at the beautiful Grove Park Inn in Asheville, North Carolina. 80 participants enjoyed an agenda packed full of great information and skills building. Some of the highlights were:

* People and Jobs on the Move: Implications for Higher Education. Dr. James Johnson, UNC-Chapel Hill
* National Perspectives on Access and Affordability. Drs Sandy Baum and Jacqueline King
* Making Yourself Heard: Effective Media Relations in the 24 Hour News Cycle. Mr. Alex Slater
* View from the Hill: A Washington Update. Ms. Becky Timmons
* Economic Outlook for Higher Education. Dr. Don Heller
* Making Your Case: Writing Persuasively. Dr. Steve Brooks and Ms. Shirley Ort
* Six Steps to Persuasive Presenting. Ms. Linda Fierman
* The Case Studies
* President’s Reception at the Biltmore Historic Horse Barn

Many thanks to Karen Fooks and her committee for their excellent workshop!

February 12-16 was the Annual SASFAA Conference held in Atlanta, GA at the Hyatt Regency downtown. The conference committee under the direction of Brent Tener presented the attendees with a wonderful mix of sessions, speakers, and activities. Many firsts were achieved at the conference: the Multi-Cultural Leadership Symposium, the electronic voting poll, 1003 registrants, 77 vendors/sponsors and almost $6300 was raised for the Ronald McDonald houses in the Atlanta area.

The highlight of the conference was the Awards Luncheon in which Ms. Francine Reeves, formerly of the DOE, was honored by being made an Honorary Lifetime Member of SASFAA and being given the President’s Special Appreciation Award for her many years of dedicated service to the SASFAA region. Many thanks are due to all the folks who volunteered during the conference as well as to GASFAA for all their hospitality.

SASFAA election results: Brent Tener, President-Elect, Deborah ‘Tolly” Tollefson, Vice President and Heather Boutell, Treasurer.

Spring state meetings began in earnest in April with TASFAA, NCASFAA, AASFAA, SCASFAA and KASFAA all having meetings between April 10-22. Guy Gibbs, President-Elect and Ms. Sain split up the responsibilities of presenting the SASFAA Update at all the meetings. President Sain attended NCASFAA and KASFAA conferences.

NCASFAA’s theme was “Wastin’ Away Again in Financial AidVille”. The meeting was held at the Hilton in Wilmington in the middle of historical downtown near the river. Highlights included Mike Rayburn “The World’s Funniest Guitar Virtuoso” as the Keynote Speaker, Anthony Jones from DOE presenting the Federal Update and the “Caribbean Island Theme” for their Annual Awards Banquet. A special roast was conducted on Alan Whittington who was retiring from Wilkes Community College after 25 years of service.

KASFAA’s conference was held in Louisville at the Hilton Garden Inn. The theme was “Explore KASFAA’s Wild Kingdom” and it was held on the 20-22nd. Kay Jacks from DOE was the Keynote Speaker and was presented a special KY Governor’s award by President Heather Boutell. Other presenters included George Chin, NASFAA Chair, Greg Martin from the DOE, and Jonathan Miller, KY State Treasurer. The President’s reception was “Survivor KASFAA Style” (Mr. Dave Cecil was the wild man during the scavenger hunt!) and the Banquet was held at the Louisville Zoo in the African Outpost. Another highlight of the conference was when Mr. Cecil was presented with the Herb Vescio Distinguished Service Award.

May travels included trips to Atlantic City and EASFAA as their inter-regional guest where Ms. Sain was the moderator for a session on Legal Issues presented by Stan Freeman; the MASFAA Annual Meeting held at the Beau Rivage in Biloxi, MS where President Sain conducted an interest session titled, “Motivating the Workforce”; then immediately after the NASFAA Board meeting, Ms. Sain concluded her May trips by heading to Virginia Beach, VA for the VASFAA Annual Conference. While at MASFAA, SASFAA’s Long-Range Planning Committee met to analyze the membership survey and finalize plans for a LRP Retreat to be held in Charlotte, NC sometime in September.

June meetings include GASFAA which Mr. Gibbs will visit and FASFAA which Ms. Sain will visit to do the SASFAA Update. Immediately after FASFAA, Ms. Sain goes to St. Pete Beach for the Transitional Board meeting at The Don CeSar Resort followed by the SWASFAA/SASFAA Mid-Level Workshop in Dallas, TX (which was close to being sold out) and then the SASFAA New Aid Officers Workshop at UNC-Asheville in NC which is also sold out!

Ms. Sain would like to take this opportunity to express her sincere thanks and appreciation for all the hospitality shown during all her travels and for all the support she experienced during her year as President of SASFAA. It has been the most rewarding and professional growth experience she has ever had and one she will never forget!

President-Elect Guy Gibbs has finalized his 2005-2006 board and he is well underway formulating his goals and objectives for the coming year.

**President Elect Guy Gibbs’Report**

**SASFAA Board of Directors Meeting**

**Report of the President-Elect**

**June 9-10, 2005**

**St. Petersburg Beach, Florida**

Rocky Mountain Association of Student Financial Aid Administrators (RMASFAA)

As an observer to the NASFAA board, the President-Elect is assigned to an interregional visit. The President-Elect attended the RMASFAA board meeting held March 11-12 in Denver, Colorado. Dave Gelinas, NASFAA National Chair-Elect also attended and brought the NASFAA update.

This proved to be in an invaluable experience. It is interesting to see how other association’s deal with issues. While the President-Elect found many similarities, there were also differences between RMASFAA and SASFAA. A special thanks to Peg Mason, President of RMASFAA, and the board for their wonderful hospitality. Peg asked that SASFAA be thanked for the hospitality shown when she attended the SAFSAA annual conference in Atlanta in February.

State Association Visits

The President-Elect attended several state spring meetings, provided greetings and updates for President Janet Sain. The visits included:

* TASFAA, Memphis, April 11
* NCASFAA, Wilmington, April 13
* SCASFAA, Myrtle Beach, April 18
* GASFAA, Braselton, June 2

It was a pleasure to have been able to attend these states meetings. A special thanks to Joanie Walker, Sharon Oliver, Betty Whalen, and Freida Jones and their program chairs for providing an opportunity to present at these conferences.

GAP Committee Meeting

Ron Day asked the President-Elect to participate in the review of the reports used to complete the GAP report. That activity was held in Nashville, Tennessee, May 6-8. The results of the evaluation are to be presented at the June board meeting.

On-going Planning Activities

The President-Elect has continued to prepare for 2005-2006. All committee chairs and two of the three liaisons have committed to serve SASFAA; however, Greg Martin of the U. S. Department of Education is currently awaiting clearance.

The transition of the 2004-2005 board with the 2005-2006 will occur on Saturday, June 11, 2005.

**Past President Ron Day’s Report**

Past President’s Report

Ron Day

As part of the responsibilities of the **Nominations and Election Committee**, a slate of candidates was presented to the membership at the annual conference in Atlanta. The results of the election:

Brent Tener President Elect

Deborah (Tolly) Tollefson Vice President

Heather Boutell Treasurer

All candidates were congratulated for their willingness to serve SASFAA.

**The GAP Committee** met May 6 – 8, 2005 in Nashville, Tennessee. The report and recommendations were sent to all board members and will be posted on the web site. The members of the 2004-2005 GAP Committee include:

Guy Gibbs (President-Elect)

Earl Mayo

Jane McNaughton

Thurman Mitchell

Rose Mary Tutt

Ron Day, Chr.

**Vice President Zita Barree’s Report**

# Vice President’s Report

Submitted by Zita Barree

June 10, 2005

New Aid Officer’s Workshop

**Join Us As We Find: the Brains to do more, the Heart to search more, the Courage to find more**

The SASFAA New Aid Officer’s Workshop begins on Sunday, June 19 at the University of North Carolina – Asheville. The instructors and staff have worked hard to put together a quality program – the draft agenda is posted on the SASFAA web site.

Due to recent resignations of two of the instructors (Michael Barree and Deborah Byrd) for health reasons, Brad Barnett of James Madison University in Virginia and Sandy Neel of University of Tennessee – Martin were recruited to fill these vacancies. The updated roster of instructors and staff is below:

**Classes and Instructors:**

Apple Orchard: Leonard Gude, University of South Florida (new)

Nancy Melton, Alice Lloyd College, KY (returning)

Kansas Farm: Sandy Neel, University of Tennessee – Martin (returning)

Brent Tener, Vanderbilt University, TN (new)

Monkey Forest: Pat Arauz, University of Louisville, KY (new)

Lynda Sayer, Furman University, SC (returning)

Munchkin Land: Deborah Barbone, North Georgia College & State University (returning)

Michelle Wright, University of South Carolina – Columbia (new)

Poppy Field: Brad Barnett, James Madison University, VA (returning)

Lisanne Masterson, Brevard College, NC (returning)

Tornado Alley: Bruce Crain, Mississippi State University (new)

Janette Overton, Johnson Bible College, TN (returning)

**Staff:**

Curriculum Coordinator: Deborah, “Tolly”, Tollefson, University of North Carolina – Greensboro, NC

Local Arrangements Coordinator: Beth Bartlett, University of North Carolina – Asheville, NC

### Lender Assistants

Jackie Bell, USA Funds Services, SC (new)

Biz Daniel, National Education, VA (returning)

Gary Mann, Suntrust/Nelnet, GA (returning)

Todd Woodlee, Education Finance Partners, GA (new)

All of these individuals are to be commended for their excellent work this year. In particular, Tolly has done an excellent job as curriculum coordinator and is more than ready for her role as SASFAA Vice President next year. Beth Bartlett has also done a great job working quietly behind the scenes on all the local arrangements.

There has been considerable interest in the workshop this year. Originally, registrations were capped at 135 but after a wait list was put together and continued to grow, a decision was made and supported by Janet Sain to increase the size of the workshop to 144. After one late cancellation, the current count for expected attendees is 143. Some statistics on the participants:

**Gender:**

Female 111

Male 31

Blank 1

**Race:**

Asian/Pacific 2

Black/African American 34

Hispanic 3

Not Specified 23

Other 1

White/Caucasian 80

**State:**

Alabama 4

Florida 29

Georgia 20

Kentucky 12

Mississippi 1

North Carolina 13

South Carolina 10

Tennessee 12

Virginia 40

Non-SASFAA 2

Of the 143 registrants, 128 are from schools.

**Thanks** also go to Ann Martin at University of North Carolina – Asheville for working so closely with us on all the logistics of the workshop, Lester McKenzie for all his work with the registration and payment process, Erik Melis for working with ATAC to get the online registration process up and running and altered when the size of the workshop was increased, Janet Sain for always being there to answer questions and provide advice and Bob Godfrey for soliciting additional sponsorship for several key activities/items.

SWASFAA/SASFAA Mid-Level Workshop

The Mid-level Workshop is June 12 – 14, 2005 at the Embassy Suites Hotel – DFW International Airport in Dallas, Texas. The workshop agenda is posted on the SWASFAA web site and there is a link to information and online registration from SASFAA’s web site.

Bob Godfrey, who will be coordinating the Mid-level Workshop next year, was unable to attend this year’s workshop. Because the SASFAA Board meeting was over the same weekend and the New Aid Officer’s Workshop starts on the 19th (with Zita and Tolly starting their travels to Asheville on the 15th and 16th respectively), it was decided that Amy Berrier from University of North Carolina - Greensboro who had already registered for the workshop as a participant and plans to work with Bob next year, could also serve as SASFAA’s representative. A big thanks to Amy for agreeing to serve in this capacity and to Tolly for supporting this decision.

**Treasurer Lester McKenzie’s Report**

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  | **Jul '04 - Jun 05** |  | **Budget** |  | **$ Over Budget** |  | **% of Budget** |
|  | **Income** | |  |  |  |  |  |  |  |
|  |  | **01 · Membership Dues** | 39,335.00 |  | 36,250.00 |  | 3,085.00 |  | 108.51% |
|  |  | **02 · Professional Advancement** | 94,858.78 |  | 100,650.00 |  | -5,791.22 |  | 94.25% |
|  |  | **03 · Annual Meeting** | 161,173.26 |  | 148,000.00 |  | 13,173.26 |  | 108.9% |
|  |  | **04 · Vendors/Sponsors/Patrons** | 188,724.42 |  | 143,000.00 |  | 45,724.42 |  | 131.98% |
|  |  | **05 · Advertising** | 20,454.37 |  | 10,000.00 |  | 10,454.37 |  | 204.54% |
|  |  | **06 · Publications** | 0.00 |  | 0.00 |  | 0.00 |  | 0.0% |
|  |  | **07 · Interest Income** | 33,670.35 |  | 13,000.00 |  | 20,670.35 |  | 259.0% |
|  |  | **08 · Miscellaneous Income** | 16.00 |  | 550.00 |  | -534.00 |  | 2.91% |
|  |  | **09 · Balance Forward** | 0.00 |  | 38,000.00 |  | -38,000.00 |  | 0.0% |
|  | **Total Income** | | 538,232.18 |  | 489,450.00 |  | 48,782.18 |  | 109.97% |
|  | **Expense** | |  |  |  |  |  |  |  |
|  |  | **101 · President** | 5,311.83 |  | 7,500.00 |  | -2,188.17 |  | 70.82% |
|  |  | **102 · President-Elect** | 5,765.60 |  | 6,900.00 |  | -1,134.40 |  | 83.56% |
|  |  | **103 · Vice President** | 973.31 |  | 3,400.00 |  | -2,426.69 |  | 28.63% |
|  |  | **104 · Secretary** | 2,225.16 |  | 5,000.00 |  | -2,774.84 |  | 44.5% |
|  |  | **105 · Treasurer** | 5,648.98 |  | 6,050.00 |  | -401.02 |  | 93.37% |
|  |  | **106 · Past President** | 4,538.53 |  | 3,500.00 |  | 1,038.53 |  | 129.67% |
|  |  | **201 · Membership/Directory** | 2,360.57 |  | 4,000.00 |  | -1,639.43 |  | 59.01% |
|  |  | **202 · Electronic Services** | 7,071.51 |  | 7,200.00 |  | -128.49 |  | 98.22% |
|  |  | **203 · Professional Adv** | 63,721.50 |  | 141,750.00 |  | -78,028.50 |  | 44.95% |
|  |  | **204 · Newsletter** | 1,343.63 |  | 2,500.00 |  | -1,156.37 |  | 53.75% |
|  |  | **205 · Finance and Audit** | 1,589.88 |  | 2,700.00 |  | -1,110.12 |  | 58.88% |
|  |  | **206 · Annual Meeting Program** | 263,547.63 |  | 208,000.00 |  | 55,547.63 |  | 126.71% |
|  |  | **207 · Site Selection** | 1,064.86 |  | 1,000.00 |  | 64.86 |  | 106.49% |
|  |  | **208 · Nominations and Elections** | 3,782.56 |  | 3,000.00 |  | 782.56 |  | 126.09% |
|  |  | **209 · By-Laws** | 0.00 |  | 0.00 |  | 0.00 |  | 0.0% |
|  |  | **210 · Executive Board** | 22,203.73 |  | 30,000.00 |  | -7,796.27 |  | 74.01% |
|  |  | **211 · President's Contingency** | 1,092.87 |  | 3,000.00 |  | -1,907.13 |  | 36.43% |
|  |  | **212 · Archives/Research** | 0.00 |  | 0.00 |  | 0.00 |  | 0.0% |
|  |  | **213 · Advance Program Planning** | 465.82 |  | 750.00 |  | -284.18 |  | 62.11% |
|  |  | **214 · Diversity Issues** | 5,143.46 |  | 5,450.00 |  | -306.54 |  | 94.38% |
|  |  | **215 · Prior Administration Bills** | 20,028.79 |  | 22,000.00 |  | -1,971.21 |  | 91.04% |
|  |  | **216 · Legislative Relations** | 612.50 |  | 4,050.00 |  | -3,437.50 |  | 15.12% |
|  |  | **217 · Long Range Planning** | 7,213.62 |  | 12,300.00 |  | -5,086.38 |  | 58.65% |
|  |  | **218 · Vendor/Sponsor/Patron** | 1,045.56 |  | 4,000.00 |  | -2,954.44 |  | 26.14% |
|  |  | **219 · Special Projects** | 1,646.43 |  | 4,900.00 |  | -3,253.57 |  | 33.6% |
|  |  | **221 · Computer Hardware/Software** | 0.00 |  | 500.00 |  | -500.00 |  | 0.0% |
|  | **Total Expense** | | 428,398.33 |  | 489,450.00 |  | -61,051.67 |  | 87.53% |
| **Net Income** | | | **109,833.85** |  | **0.00** |  | **109,833.85** |  | **100.0%** |
|  |  |  |  |  |  |  |  |  |  |

**ATTACHMENT B**

**STATE PRESIDENTS REPORTS**

**Florida State Report**

No report submitted

**Kentucky State Report**

Report from the Kentucky State President

Heather H. Boutell, KASFAA President

Spring Conference

KASFAA’s Spring Conference was held April 20-22, 2005, at the Louisville Airport Hilton Garden Inn in Louisville, KY. Chester Priest and his adventurous Program Committee did an excellent job planning our Spring Conference. The conference theme, “Exploring KASFAA’s Wild Kingdom” invited participants on a safari complete with live animals, a trip to the zoo, and animal crackers! Jennifer Cosens, Treasurer, reported that our attendance at this conference (close to 300) was the largest ever at a KASFAA Conference. We had more vendor support this year, so thank you to Mike Seiler, Vendor/Sponsor Chair, and all of our vendors for their contributions! KASFAA invited several special guests at the conference. The Department of Education is to be thanked for allowing Kay Jacks and Greg Martin to attend and present several sessions. Kay, who started her financial aid career in Kentucky, was presented the KASFAA Heritage Award. Brad Barnett, Virginia President-Elect, attended the conference and provided a few sessions for our members. KASFAA was honored to have NASFAA representatives George Chin, NASFAA Chair, and Connie McCormick in attendance. SASFAA was also well represented with President Janet Sain providing the SASFAA Update, and Treasurer Lester McKenzie attended. Janet was able to present SASFAA Lifetime Member awards to Judy Deines and Marilyn Clark-Watkins. KASFAA presented plaques to new Lifetime members, Judy Deines and Marian Spencer. Our highest honor in Kentucky, the Herb Vescio Distinguished Service Award, was presented to Dave Cecil for his outstanding accomplishments in our state, region and nation.

Election Results

KASFAA’s future is now in the hands of our newest elected officers, Runan Pendergrast, President-Elect, Jennifer Cosens, Treasurer, Bryan Erslan, Vice President, Katie Valentine, Private School Sector Representative, and Wendi Dailey, Agency Sector Representative. These new leaders will serve Kentucky well to keep KASFAA moving to fulfill our mission.

Support Staff Workshop

KASFAA offered a Support Staff Workshop in Lexington, KY, on May 16, 2005. Approximately 50 support staff personnel attended to learn how to calculate an EFC, listen to a session on customer service, and get general information on the loan programs.

College Goal Sunday

Kentucky sponsored College Goal Sunday (CGS) on February 27, at 19 locations in 18 different cities from 2-4 p.m. Over 200 KASFAA members volunteered on that day to help families learn about the FAFSA, or to give one-on-one assistance. Over 750 students were in attendance. Evaluations from the event reveal that CGS is a very worthwhile and important event for our state, and we look forward to working with NASFAA to enhance our program in the years to come.

Legislative Issues

As previously reported, KASFAA drafted legislation, HB 460, which was presented in the Kentucky chambers for approval. After several KASFAA members testified before Education Committees, both the Kentucky House and Senate voted unanimously to approve our bill. The bill was signed by our governor on March 18. President Boutell congratulates the task force on writing legislation, finding a sponsor, and bringing it before our policy decision makers. This task force and its work was presented to NASFAA to a national award for Service to Other Constituencies. Two other projects were presented so Kentucky is hopeful about New York City.

Transition Meeting

President-Elect Shelley Park conducted KASFAA’s annual transition meeting on May 23 and 24 in Covington, KY. Shelley’s theme encouraged new leaders to join her “team” and attend “training camp”. Everything revolved around baseball, as KASFAA’s 04-05 Board helped new members “round the bases”. KASFAA’s 05-06 Board members attended sessions to learn about their new responsibilities and even crossed the river for a Cincinnati Reds ball game.

Board Activities

President Boutell wishes to thank the Board members who served with her this year in SASFAA. She developed some friendships that will last a lifetime. The state presidents were very supportive to her throughout the year, and provided her with some ideas for her own state. She looks forward to working with all of you in the future as SASFAA Treasurer, and wishes President-Elect Park luck on the Board in 05-06.

**South Carolina State Report**

**SCASFAA Report to SASFAA**

**The Don CeSar Resort**

**June 10, 2005**

The SCASFAA Spring Conference was held April 17-20 in Myrtle Beach at the Ocean Dunes Resort and Conference Center. Two-hundred SCASFAA members came to the beach and enjoyed the perfect combination of professional and personal development and serious fun.

From a scavenger hunt which had groups following somewhat obtuse clues in search of “celebrities”…to a ‘special’ beauty contest featuring some of SCASFAA’s loveliest(?)…to a banquet at the historic Pine Lakes Country Club followed by an evening of entertainment at the Alabama Theatre, SCASFAA’s evenings were full of fun and excitement.

Throughout the conference, members participated in a silent auction with all proceeds donated to the Horry County Shelter. SCASFAA presented the shelter with a donation in excess of $1300.

Our days were serious and productive as Steve Morgan from New Orleans presented two general sessions and created a heightened awareness among us that we are ‘wired’ differently and it is essential that we understand, appreciate and work well with all types of folks. We all now know a little more about why we are the way we are…..

Anthony Jones and Kathy Gause provided the federal update and presented other sessions; Wood Mason conducted a session on COD; Ron Bennett enlightened attendees on NSLDS and loan consolidation issues. SCASFAA sincerely appreciates each of the presenters from the US Department of Education.

In addition, representatives from SC agencies provided updates, several SCASFAA members presented a variety of interest sessions and we all learned from each other. Jennifer Jones-Gaddy, SCSLC, served as conference chair for “The One and Only SCASFAA.” JJ and the conference committee are once again commended for an outstanding conference.

As is our tradition at the spring conference, SCASFAA elected officers for the 2005-06 year. Our association was fortunate to have been presented with an outstanding dual slate of candidates. Leading SCASFAA for the coming year will be:

President Nancy Garmroth, Spartanburg Technical College

President-Elect Kim Jenerette, USC Upstate

Vice President Tabatha McAllister, York Technical College

Treasurer Kim Ellisor, Francis Marion University

Member at Large Jeff Holliday, Anderson College

Marty Carney of Furman University will continue in the second year of his 2 year term as secretary.

SCASFAA’s first Diversity Workshops were held in late February in Greenville and Columbia. We had more than 60 members in attendance. A Mid-level Management Institute was held in March with more than 40 attendees. Evaluations for both functions were excellent. Thanks to Bridget Blackwell and Elizabeth Milam-Lomas for organizing these activities.

Our transition meeting is scheduled for June 27-28 in Columbia. The 2004-05 Board and committee chairs will conclude business for the year and turn the leadership over to Nancy Garmroth and the new Board and committee chairs. I look forward to handing Nancy the gavel and wearing the infamous SCASFAA “Has Been” black ribbon at our next conference in October in beautiful Charleston.

Betty Whalen

SCASFAA President 2004-05

**Virginia State Report**

The VASFAA Annual Conference was held at the brand new Hilton Oceanfront in Virginia Beach. May 22-25. It was the intent of the Board to have a SASFAA-caliber conference to mark our switch to an annual event. I don’t believe that I am exaggerating when I say it was a resounding success. We attracted a record 356 registrants (our previous high attendance was 275). Our opening general session featured Jean Chatzky from the Today show who spoke to us about personal finances. ECMC added to the event by presenting her book to attendees. We featured a Washington insiders session with Brett Lief , President of NCHELP, Maureen Budetti, from NAICU, and Kathleen Smith, President of Education Finance Council, with the event moderated by Ron Gambill. We had a teambuilding event on the beach (who would have though that sandcastles could be so different!) Our Tuesday night dinner club featured Mike Rayburn; a real talent with a gift for comedy. Biz Daniel, conference chair, Mike Hawkes, training chair, and Michael Poma, membership chair and their respective committees all made this conference one to remember! Of course, any of the SFAA conferences couldn’t be possible without the support of our partners in the student loan industry, and our conference was marked by another record showing by these partners – 39. This success was due in part to the efforts of Jolene Burke, who had to leave the conference for medical reasons (she’s doing fine!)

During the conference, the association held its annual election of officers. The results of the election are as follows:

President Elect: Erik Melis, George Mason University

Treasurer Elect: Kerrie Roth, Old Dominion University

Secretary: Leslie Thomas, George Mason University

Representative at Large (2 years): Angie Hawkins, Virginia Wesleyan College

Representative at Large (2 years) Keith Wellings, Hampden Sydney College

Representative at Large (1 year) Melissa Collum Wyatt, SCHEV

The association also voted to fix the board composition at four representatives at large, rather than one per one hundred. The association has varied over the past several years from three to five representatives, with the tendency being towards four. This change should help stabilize the governance and organizational structure, allowing for better continuity from year to year.

One of the themes that Brad Barnett, our President Elect, and I shared was that of continuity. I believe that we worked very hard to provide that to the association by many of our actions, such as contracting with the Hilton Oceanfront for three years, establishing standard goals for each committee, and ensuring open lines of communication. Brad marks the start of his year with the Board transition at Graves’ Mountain Lodge (June 6 – 8) in Syria, followed immediately by the SASFAA Board transition. We’re also fortunate to have Tara Telfair to again facilitate our transition

I want to take this opportunity to thank the entire Board, the Committee Chairs and their members, the vendors and sponsors, and the entire membership for their support, participation and efforts to make this a great year. It has indeed been my pleasure to serve as President and it has been the highlight of my career in the financial aid community. It has also been a pleasure to be associated with the Board of SASFAA and to serve with their elected officers and the other state’s presidents – quite a remarkable group of professionals. .Thank you.

To quote Garrison Keillor: be well, do good work and keep in touch.

**Tennessee State Report**

**Tennessee Report**

**Joanie Walker**

**TASFAA President**

The TASFAA Spring Conference: TASFAA – Walking in Memphis was held as you might expect in Memphis, TN. The conference was well attended with several highlights, those being special guests, Guy Gibbs and Laura Divan-Brown and also a reception at the Memphis Peabody.

The TASFAA Executive Board at the conference voted to no longer charge a fee to be a member of TASFAA. This is assist financial aid administrators employed at institutions that choose not to pay individual membership fees. The board is currently working on the details that follow this decision, such as, implementing a new membership form, revising TASFAA Policies & Procedures Manual, etc. The conference fees will be increased so that the association will not experience a loss in revenue.

A second change in association governance is how members will be reimbursed for meal allowances. The old policy asked members time of travel and allowed a specific amount per meal. The new policy does not ask for time of travel and gives a per diem for meals. There is always concern that this type of policy will be abused but in spite of that, the board believed the new policy to be better for the association.

Plans are in place for the annual transition meeting. Forrest Stuart and I have secured a speaker and working on the schedule for the event.

Over the past three months I have served on the search committee for the Executive Director of TSAC. At this point in time, we do have a final candidate and are waiting on the background search to be completed. Twenty-eight resumes were submitted for this position; five people were interviewed with three individuals selected as the top choices. I am extremely hopeful that by the time of the SAFAA Transition Meeting, the process will be complete.

I have enjoyed my experience on the SASFAA Executive Board, gotten to know many new people and look forward to serving in some capacity in the future. Since Clyde will transition onto the SASFAA Board next year as TASFAA President-Elect, you may still see me at The Don CeSar but only if you are poolside.

Joanie Walker

TASFAA President

**Alabama State report**

Alabama President’s SASFAA Newsletter Report for Summer 2005

Dear Colleagues:

The 2005 AASFAA Spring Conference was a resounding success! Held at the Perdido Beach Resort in Orange Beach, this conference was memorable for all the right reasons. The conference theme was “Structurally Sound and Ready for New Challenges”, which reflected the physical status of the conference facility after Orange Beach was severely battered by Hurricane Ivan last October. Repairs were completed on time, and the conference facility reopened a few weeks before the conference began.

Three tracks (New Aid Officer, Mid-Level, and Senior) were offered for all the concurrent sessions, and all sessions were well attended throughout the conference. The majority of the concurrent sessions were taught by individuals from outside the AASFAA membership; this allowed AASFAA members to more fully participate in the conference. Our “fed” was Deborah Tarpley from Denver, CO. She presented in general sessions on all three days of the conference, and did a great job.

President Chip Quisenberry presented AASFAA Certificates of Appreciation to the following members who are retiring from student aid positions this year: Cindy Massey (SouthTrust Bank/Wachovia); Pat Reedy (University of West Alabama), Dot Wilkinson (Southern Union State Community College), Mae Glosson (University of Montevallo), and Cornelia Miller (Jefferson Davis State Community College). Cindy Massey, Dot Wilkinson, and Pat Reedy were also presented with Lifetime Achievement Awards at the Association Banquet on Thursday night.

The following members were elected to serve the AASFAA membership for 2005-2006:

President Buddy Jackson, Faulkner University

President-Elect Jonna Moses, Regions Student Loan Center

Vice-President Ben Baker, University of North Alabama

Treasurer Charles Markle, Auburn University

Treasurer-Elect Lissa Burleson, Samford University

Secretary Donna Bass, Lurleen B. Wallace State Community College

AASFAA’s Legacy Scholarships (valued at $1,000 each) were presented to the following schools:

The Shirley Spear Legacy Scholarship Linda Calvanese, Remington College

The Bill Gentry Legacy Scholarship Suzanne Bush, Bevill State Community College

The Floyd Johnson Legacy Scholarship Wanda Bass, Lurleen B. Wallace Community College

The Theresa Duke Legacy Scholarship Tracy Adams, Jefferson State Community College

The AASFAA Legacy Scholarship Joan Waters, Chattahoochee Valley Community College

The highlight of the conference was the appearance of the Honorable John H. Buchanan, Jr. AASFAA named its Distinguished Service Award after Mr. Buchanan in 1980 due to his many contributions to education as the Birmingham district representative in the U.S. Congress. Mr. and Mrs. Buchanan were invited to attend the 25th Spring conference since he received that first award, and he delivered a rousing, inspiring message to the membership at the Thursday evening banquet, telling the membership that AASFAA is in the “business of giving hope to those who lack it”. In a time when we tend to get bogged down in the minutiae of delivering aid to students, Mr. Buchanan reminded us of our higher purpose.

Respectfully submitted,

Chip Quisenberry

2004-05 AASFAA President

**Mississippi State Report**

SASFAA Transitional Board Meeting

The Don CeSar, St. Petersburg, Florida

June 9-11, 2005

### Report from Mississippi State President, Laura Diven-Brown

The 38th Annual MASFAA Conference was held May 18-20, 2005, at the Beau Rivage Resort in Biloxi. In addition to the 188 Mississippi members who participated, several special guests were in attendance, including SASFAA President Janet Sain, TASFAA President Joanie Walker, TASFAA President-Elect 2005-06 Clyde Walker, and KASFAA President Heather Boutell. In addition, the SASFAA Long-Range Planning Committee (including Janet, Carol Mowbray, Tom Morehouse, Juanita Russell, Jane McNaughton, and Cruzie Lucero) arranged their May meeting to coincide with our conference in Biloxi, so they were able to dine with the MASFAA Board on May 17th. It was great to have our SASFAA friends join us!

The theme of the conference, “MASFAA in May”, celebrated the fact that the event was being held in May for the first time. A festival atmosphere was featured by Conference Chair Wendy Hutchins and her committee. They did an outstanding job!

The Opening Session kicked off with a very dynamic set of election speeches from our officer candidates and a memorable salute to new Honorary Lifetime Member Larry Blankenship. The session concluded with the Magic of Steven Bargatze, an internationally acclaimed professional magician who not only performed comedy entertainment and magical wonders for the audience, but also shared his personal story about the importance of education in his life. Then the membership gathered outside on the hotel deck for the President’s Reception, overlooking the beautiful Mississippi gulf coast.

Day two of the conference commenced with a panel discussion on ethics in the world of financial aid, which was a great topic. The remainder of the day involved twenty break-out sessions followed by a general session that honored MASFAA past presidents, new members, and the vendors/sponsors who made the conference possible. The schools surprised the sponsors with tokens of their appreciation so that every sponsor in attendance got to take home a gift with a school logo on it. Then the night rolled on with a beach party that included beach balls on the deck and flip flops!

The last day of the event featured updates from Janet Sain (on behalf of SASFAA), the Mississippi Office of Student Financial Aid, Dave Elliott from the Department of Education, and Claude Pressnell and Nicole Barry of the Advisory Committee on Student Financial Assistance.

The 2005-06 MASFAA election results were announced. A total of 193 votes were cast – a new record for MASFAA. Congratulations to:

President Elect – Garry Jones, East Mississippi Community College

Vice-President – LaShanda Chamberlain, MS Gulf Coast Community College – Jackson County Campus

Secretary – Michael Ruffin, Education Services Foundation (ESF)

Member at Large – Nancy Gault, Mississippi University for Women

Director – Peggy Shoemake, Pearl River Community College

To conclude the conference, several MASFAA members were presented with special awards, including

Jane McNaughton, recipient of the Jack Woodward Award of Excellence

Wendy Hutchins, recipient of the President's Special Recognition Award for 2004-05

Lynda Gist, “Rookie of the Year”

The 2004-05 MASFAA Board, committee chairs, and members had a very productive year. In addition to an excellent annual conference, here are just a few bullet points from the year in review:

* A comprehensive revision of the Policies & Procedures was completed
* A financial review was performed
* The association’s historical documents were imaged and preserved on a CD
* A successful fall training workshop, “Student Loan Issues”, was held
* The annual “Financial Aid 101” for new financial aid professionals was enhanced with concurrent sessions and promotion of financial aid as a profession
* A drawing was held to allow a “Financial Aid 101” participant to attend the MASFAA conference by providing complimentary registration and hotel room
* Sponsorship goals for the year were exceeded
* The Board balanced a growing budget
* MASFAA communicated with H.S. administrators and performed outreach in the Mississippi Delta
* The Board spoke out on key legislative issues
* A quality paper newsletter was delivered to the membership, with three issues produced
* The membership had the opportunity to meet formally with the Mississippi Office of State Student Financial Aid (MOSFA) in April to discuss state grant and loan programs, including how to implement EFT for the upcoming year (a joint MASFAA/MOSFA goal)
* Electronic services were enhanced with MASFAA’s first online fall training and conference registrations, an improved listserv, frequent photo changes on the website, a new online conference evaluation form, and a new online volunteer form

Incoming 2005-06 MASFAA President, Soraya Welden, has scheduled the Transitional Board Meeting for June 27-28 in Jackson. MASFAA is looking forward to another great year!

**North Carolina State Report**

**NORTH CAROLINA STATE REPORT**

*Sharon Oliver, NCASFAA President*

The North Carolina Association for Student Financial Aid Administrators experienced a year of excitement, growth, and rewards. The excitement began when North Carolina was selected as the recipient of the 2004 NASFAA State Award for Service to Financial Aid Profession with the submission of the Neophyte List serve. This indeed is an honor and a privilege which led to even greater opportunities throughout the year as we focused primarily on training and volunteers.

**TRAINING**

We were fortunate to provide to our members two pre-conference workshops sponsored by the Department of Education on relevant topics such as “Return of Title IV, Analyzing Data and Conflicting Training” and “Federal Student Aid Audits and Program Reviews.” The North Carolina State Education Assistance Authority (NCSEAA) provided the material for the NASFAA Training session on “Federal Stafford and Direct Loans.” Also, they assisted in conjunction with our New Aid Officers Training with providing a symposium on “Professional Judgment” and training for New Aid Administrators. The support staff committee rendered workshops on “Insights on Effective Communication” and “You and Your Attitude.” For the participants who joined us for our fall and spring conferences, they were enlightened by our keynote speakers Hallerin Hilton Hill and Mike Rayburn. There were over twenty-five (25) informative sessions to choose from at each conference.

**VOLUNTEERS**

The success of the association is contingent upon the volunteers and their level of commitment. Volunteerism was highly promoted through several avenues on this year. The president’s message for the fall newsletter was “Volunteers Make A Difference.” Also, we established a volunteer booth at our spring conference and conducted a session on NCASFAA Idol 101. Additionally, the Executive Board members attended the New Aid Officers Workshops and briefly shared their roles and invited new members to become actively involved in the association. During the fall conference, new members were selected to serve as moderators.

**ACCOMPLISHMENTS**

A special thank you is extended to the Executive Board for their dedication, enthusiasm, and loyalty to NCASFAA. Ourprimary goals for this year were to develop future leaders and provide excellent professional training and develop programs considering members experience, institutional type and level of responsibilities. We successfully achieved the following goals:

* Increased the number of participants for NASFAA Leadership Conference
* Provided two Department of Education Training Sessions as Pre-Conference Workshops
* Promoted volunteerism through articles, volunteer booth, and sessions
* Increased membership from 465 to 473
* Awarded NCASFAA Scholarships at the fall and spring conferences
* Established a Long Range Planning Guide
* Developed policies for NCASFAA grant which will be used to assist middle school students entitled “NCASFAA Summer Enrichment Scholarship”
* Placed NCASFAA Pocket Directory on the web
* Recognized Agencies at the President’s Reception
* Provided specialized training for New Aid Officers—Professional Judgment Symposium

**TRANSITION BOARD RETREAT**

The transition board retreat will be held on June 20-21, 2005 in Greensboro, NC at Ashford Suites. The executive board members have submitted annual reports that will be used to prepare goals and objectives for 2005-06 and budgets.

Through NCASFAA’s Executive Board, committees, website and members, we will continue to strive to develop and strengthen the professional competency of student financial aid administrators and encourage members to take advantage of the training opportunities and services available.

**Georgia State Report**

GASFAA has had a wonderful year. Plans are in place to work extremely hard on developing new talent and building member confidence for running for office at the state and regional level. The incoming president, Suzanne Pittman, is dedicating this job to a committee chair for 2005-2006. She is to be commended for her follow-through on our discussions. At the GASFAA conference, there was a booth dedicated to professional development. In short GASFAA will be working diligently to be a feeder to SASFAA’s committees and offices.

GASFAA Spring Conference was June 1-3, 2005 at Chateau Elan, Braselton, GA. Special thanks go to Guy Gibbs for coming to give the SASFAA update.

It was truly an honor to serve on the SASFAA board as State President Thanks go to GASFAA for making this opportunity possibly.

Respectfully submitted,

Freida J. Jones

**ATTACHMENT C**

**COMMITTEE REPORTS**

**Membership Chair’s Report**

SASFAA Membership Committee Report

June 2005

SASFAA has hit a new record in membership: **1,540 members**. This represents a growth of more than 130 members over 2003-04.

Here are the current segmented data:

**By State (Alpha): By State (Rank) Ethnicity:**

AL: 112 GA: 268 White, Caucasian: 765

FL: 264 FL: 264 Black, African-American: 258

GA: 268 NON-SASFAA: 201 Hispanic: 38

KY: 80 NC: 155 Asian or Pacific Is: 9

MS: 78 TN: 136 Other: 7

NC: 155 VA: 131 American Indian: 1 SC: 115 SC: 115 Not reported: 462

TN: 136 AL: 112 **Gender:**

VA: 131 KY: 80 Male: 477

NON-SASFAA: 201 MS: 78 Female: 978

Not reported: 85

I have thoroughly enjoyed working as Membership Chair for two years. Our committee of state association membership chairs has done a wonderful job of “towing” the SASFAA membership line. My thanks to them and to both Ron Day and Janet Sain for allowing me to serve both in 2003-04 and 2004-05.

Forrest M. Stuart

SASFAA Membership Chair

Rhodes College

**Site Selection Report**

**SASFAA Transitional Board Meeting**

**June 9-12, 2005**

**St. Petersburg Beach, FL**

**Site Selection Report**

Final contract negotiations were completed with the Hyatt Regency-Crystal City in Arlington, VA for the 2008 SASFAA Annual Meeting. Based on the wonderful attendance in Atlanta, additional space was blocked, which can be released at a later date if not needed.

Exhibit space should not be a problem for the 2006 meeting to be held in Greensboro, but if additional sleeping rooms are needed, it will be necessary to select an overflow hotel. There will be a site visit during the summer to review potential hotels.

Follow-up has also been initiated with the Renaissance Nashville which is the site for 2007. The exhibit space is limited in comparison to what was used in Atlanta. The hotel is looking into options with the Convention Center.

Additional contract negotiations have been initiated for the Conference Planning Committee for an October 2005 meeting.

The GAP Report was completed with the recommendations for 2005-2006.

Submitted by Ron Gambill

**Vendor/Sponsor Report**

SASFAA Executive Board Meeting

June 10-12, 2005

St. Petersburg, FL

2004-05 Sponsorship End-of-Year Report

Summary

The 2004-05 year for sponsorship has been extraordinary. The budgetary expectation of $143,000 in sponsorship and $10,000 in advertising appeared, at the time, to be daunting. Through a combination of factors, we were fortunate to significantly exceed those budgetary goals.

As of 6/6/05 the sponsorship income total is $185,219 with a few outstanding invoices, and income from the New Aid Officers’ workshop to be realized. If should end up close to the $190,000 figure.

Our newsletter advertising showed an amazing increase of almost 100%. As of 6/06/05 the amount collected for advertising is $19,952.

The combined amount coordinated by the sponsorship chair is $205,171 and will rise slightly before the end of the year.

A number of factors played a role in the increase and it is important to keep these in mind as future budgets are drawn.

1. Conference Location: By all measures, Atlanta is a popular location for our annual conference. This was reflected in an increase in the number of vendors at the conference. We saw a dozen new vendors in Atlanta who were not in Birmingham. While this is significant, the overall increase in revenue was approximately $12,000 because most of the new vendors came in at the Bronze (entry) level.
2. Management Institute: The institute provided a challenge for sponsorship so as to not raise funds at the expense of other on-going sponsorship initiatives. In other words, any sponsorship we receive for the management institute should not result in a subsequent reduction of the sponsor’s other SASFAA commitments. We were surprisingly successful in raising $9700 for the institute, and fortunately, saw no reduction in other SASFAA support from the sponsors. The approach taken by the sponsorship chair was to emphasize the uniqueness of this opportunity and have companies sponsor specific speakers. This was found to be quite successful.
3. Banner Advertising Up Significantly: The number of banner ads rose from 11 for 03-04 to 18 for 04-05. With ads now priced at $1200, we saw an increase of $8400 over last year’s total.
4. Newsletter Ads: I can offer no reason why there was much more interest in advertising in our newsletter this year. We can only hope the interest continues.

Meeting Sponsorship

We are grateful to the following sponsors who have contributed to the success of this transitional meeting.

Edamerica/Edsouth

Chase/Bank One

Wachovia Education Finance

Sun Trust

Southwest Student Services

Next Student

New Aid Officer’s Workshop

Sponsorship has been secured for the New Aid Officer’s from the following:

Participants’ T-shirts Sallie Mae

Instructors’ Polo shirts PNC Bank

General Support Wachovia Education Finance

Personal Note:

It has been an honor and pleasure serving as sponsorship chair for the past two years. I want to thank Ron and Janet for asking me to undertake this role. It has been a great deal of fun.

I also want to thank Lester McKenzie for his invaluable help. There is a great deal of interaction between the treasurer and the sponsorship chair. Lester has been great to work with. I could never have done it without his help. It’s been a real pleasure.

I also want to thank Eric for his work on the sponsorship-related web activity. We “broke in” many new initiatives on the web during the past two years. He has been a pleasure to work with.

And, last, but not least, my deepest appreciation for the dozens of friends and sponsors that have contributed to the success of SASFAA by their contributions. They have been great. There are some that, when approached, never turned me down. I appreciated that very much.

Sincerely,

Bob Godfrey

Sponsorship Chair

**Conference Chair Report**

**Conference Committee Report**

**Brent Tener, Chair**

**Transition Meeting – June, 2005**

The following includes summary information regarding the Annual Conference Committee that was developed for the GAP Report. We had a great year and I appreciate all of the support from the planning committee and local arrangements committee. A special thanks to Lisanne Masterson, next year’s chair for her help and Lisa Mitchem and Todd Woodlee for doing a great job with local arrangements.

1. Objectives for 2004-2005

* **Provide opportunities for the participation and growth of new members.**
* **Work with all sectors of the region's financial aid community to ensure representation and participation in all Association programs and activities.**
* **Provide timely information useful to all sectors of the membership.**
* **Address a full range of issues, ranging from policies to daily operations.**
* **Provide a means for networking between and among all sectors of the membership.**
* **Enhance the use of new and emerging technologies (i.e., internet, etc.) as a more timely and cost-efficient means of communicating with the membership.**
* **Apprise members of legislative issues affecting the profession.**
* **Educate members of alternative approaches.**
* **Encourage *timely, effective involvement i*n *financial aid* issues affecting the profession.**
* **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 on the basis of systematic 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.**
* **Provide open forum opportunities to accommodate timely topics not considered when the program was planned.**
* **Recognize and encourage the development of informal "networking" strategies for sharing information and locating job opportunities.**
* **Recognize and provide opportunities for pre- and post-conference training and recreational activities.**
* **Continue to provide an annual, intensive training workshop designed to provide new aid administrators the basic framework of knowledge needed to administer student financial assistance programs.**
* **Encourage participation in professional development activities by experienced members who represent the diversity of the membership and are capable of motivating and teaching others.**
* **Offer periodic opportunities for experienced aid administrators to grow in leadership, management, and other advanced functions of aid administration.**
* **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.**
* **Provide special attention to new technologies as both an object of training efforts and as a vehicle for presenting other topics for training, discussion, and advancement.**

1. Indicate how the committee objectives are related to the SASFAA Mission Statement.

This committees’ activities relate directly to SASFAA’s goals of providing for the professional growth and competencies of its members, enhancing alliances between and among various sectors of the student financial aid community, and promoting the development of future leaders by actively involving its membership.

1. Which Long-Range Planning Goals did the committee objective support? Please identify.

* **Promote and encourage active participation by all members in activities of the Association.**
* **Facilitate alliances between and among various sectors and diverse members of the financial aid community.**
* **Disseminate information to enhance communications among members in a timely and cost-efficient manner.**
* **Apprise members of legislative issues affecting the profession, educate members of alternative approaches, encourage involvement on issues and advocate positions when reasonable consensus exists.**
* **Provide for the professional growth and competencies of members by offering workshops, seminars, meetings and other training opportunities to meet the needs of the membership.**

1. State the activities and accomplishments that were significant for this committee.

* **A total of 969 attendees, with 229 indicating they were first-time attendees. We had over 1000 individuals register for the conference; exceeding the 1000 registration mark for the first time.**
* **100% online conference registration process**
* **The online conference evaluation process included 330 respondents – of which, 93.3% indicated the conference met their professional needs and 93% indicated that the conference met their expectations.**
* **Utilized 86.4% of contracted hotel room block that more than met the 80% requirement (this compares to 89% for 2004, over 100% for 2003 and 90% for 2002). We also arranged overflow accommodations for 3 additional hotels when there were no available rooms in the conference hotel.**
* **A total of 49 concurrent interest sessions were offered in six different track designations – from the evaluation forms, respondents rated the quality of the sessions as being a 4.24 on a scale of 1 to 5 (with 5 being the highest possible score), compared to an average score of 4.17 in 2004.**
* **The opening session with Jon-Paul Hutchins as the keynote speaker – this event scored a 3.60 on the evaluations on a 1 to 5 scale compared to last year’s opening session that received a 4.66 score.**
* **Successful SASFAA Community Service Project, which raised $6290 for the Atlanta area Ronald McDonald Houses.**
* **Targeted e-mails were sent to first-time attendees welcoming them to SASFAA and trying to get them better acclimated to the conference ahead of time.**
* **We worked extremely hard to provide updated e-mail information to the conference attendees. From the evaluation forms, respondents rated the pre-conference information as being 4.58 on a scale from 1 to 5, compared to a 3.82 average last year.**
* **We instituted a “Daily News” that was produced each day, providing a review of the prior day’s activities along with previewing things to come. This provided a great way to communicate with attendees during the conference.**
* **We provided a hands-on learning lab so individuals could experience, first hand, new technologies. NSLP and ASA sponsored this activity.**
* **Based upon the conference evaluation, people continue to believe that the conference fee of $185.00 is reasonable.**
* **We provided free time on Monday for attendees to visit Atlanta-area sites, meet with the Feds and/or tour the vendor area.**
* **We opened the PC Lab (for e-mail and internet) 45 minutes to 1 hour prior to the first session, and left the lab open until 5:00pm each day. This scheduling seemed to be adequate.**

1. What would this committee do differently? What did the committee find most successful? Least successful?
   * **Having information from ATAC available in real-time was very helpful in managing the conference.**
   * **We continue to have a difficult time with meal counts for the various functions; especially the Tuesday dinner and Wednesday breakfast. We will continue to work on a model that can more accurately predict the numbers of individuals attending the functions. The information obtained during the registration process is not accurate.**
   * **The process by which complimentary registrations are handled in the ATAC system continues to be somewhat cumbersome. Paula at ATAC entered complimentary registrations for approximately 20 individuals.**
   * **We are significantly over-budget, largely due to the expense of meals at the Hyatt. We did, however, experience record income to offset a majority of the additional expenses.**
   * **The conference hotel was sold out of space prior to the conference. However, our pickup was only 89%. Part of the problem includes individuals or companies that book rooms early and then cancel these prior to the conference.**
2. Were resources available to the committee adequate to accomplish its goals and objectives? If not, what was needed that was not provided?

**The resources allocated were sufficient.**

1. Was the level of support from the Board of Directors appropriate? If not, what was needed that was not provided?

**The level of support was appropriate.**

1. What was the major means of communication between your committee members? Meetings, email, memo, fax, phone, etc.? Were these means adequate? Which did you find to be most effective?

**We held two planning meetings, conducted two conference calls and exchanged numerous e-mails. All forms of communication were necessary to accomplish the committee’s goals.**

1. Please provide your recommendations and suggestions for next year’s committee.

A transitional meeting was held at the conclusion of the 2005 conference with both the 2004-05 Conference Committee and those members of the 2005-06 committee that have already been identified. Lisanne Masterson, next year’s Conference Committee chair, took lots of good notes during that meeting. In addition, Brent will be sharing with her comprehensive information, including paper and electronic records, as well as any suggestions prior to the June SASFAA Board Transition meeting.

**Budget and Finance Chair Report**

Report from Audit and Finance – Karen Koonce, Chair  
Karen reported that two of our CDs turned over in the last couple months. Both were reinvested in the Suntrust Securities Group. See the updated list of investments dated June 8, 2005. Finally, all of our CD’s have been turned over and are invested in the same group under separate securities. This should make things easier to track in the future. A copy of the current CD listing was available at the meeting.

The asset list had not changed since our last meeting, but there was the addition of a laptop held by the conference chair. Information has been forwarded to the new budget and finance chair for 05-06.

The budget had overages in some categories. Several budgets were adjusted to accommodate these overages. After the board meeting, the budget will need another adjustment if the goal is to not have any category over budget.

Since there was an issue with the balance sheet showing amounts from previous CDs that had been cashed in as erroneous figures, Lester McKenzie has purchased new software to correct the problem.

**Newsletter Editor’s Report**

**June Board Report from Newsletter Editor, April Kendrick**

Since the last board meeting in Atlanta, the following activities have transpired:

The third quarterly edition of the newsletter, ***SASFAA Spring 2005 Newsletter***, was placed to the SASFAA Web site and accessible May 1st, 2005. A special thanks to the elected board, state presidents, committee chairs and liaisons for providing their reports for the Winter SASFAA Newsletter. In addition, SASFAA members provided other articles for publication, and the newsletter editor was able to add additional information pertinent to financial aid and the mission of the association. The SASFAA sponsors came through again and provided 16 advertisements. Also, thanks to Bob Godfrey for working with the sponsors and obtaining a commitment for newsletter advertisements.

# June Quarterly Newsletter

The June Newsletter will include reports from the Elected Officers, State Presidents, Committee Chairs, Liaisons and articles from the SASFAA membership. The SASFAA sponsors will come through once again and will provide 17 advertisements. As required by Policy, the June Newsletter will contain the annual report.

The newsletter editor would like to thank each elected board member, state president, committee chair and liaisons for their assistance given this year. Also thanks to those individuals not on the board and/or serving as chairs of committees for the submission of articles for publication.

The editor would also like to thank President Janet Sain and President-Elect Guy Gibbs for their guidance and assistance during the year and for inviting her to serve as newsletter editor for 2004-2005 and again for 2005-2006.

**Diversity Chair Report**

**SASFAA Diversity Report**

**SASFAA Transition Meeting**

**The Don CeSar**

**St. Petersburg, Florida**

**June 10, 2005**

The SASFAA Diversity Committee offered an excellent assortment of activities and programs for SASFAA members at the annual conference in Atlanta, Georgia. The activities and programs were well received by the members, and many positive comments were received.

SASFAA’s first multicultural leadership symposium was a huge success. The most popular session of the symposium was the distinguished panel of NASFAA, SASFAA and state leaders. These individuals (Ron Anderson, Mary Givhan, Cruzita Lucero and Sharon Oliver) shared their personal experiences and expertise with the group. Joel Harrell served as facilitator and did an outstanding job. Sponsorship provided to the symposium was received from ECMC (program); TG (lunch co-sponsor); Regions (continental breakfast, break and lunch co-sponsors) and Bank of America (co-sponsor of afternoon speaker). The Diversity Committee expresses its appreciation to all sponsors for their contributions and participation.

Also, the committee offered four interest sessions during the conference; an outing to the Martin Luther King Center and a general session on sexual orientation issues in the workplace.

As its last project for the year, the committee analyzed the results of the Diversity survey that was made available to the membership via the internet. The survey was developed in an effort to determine what diversity means to the membership, and what type of activities/interest sessions they would like to see offered at future SASFAA conferences in the area of diversity. The results of the survey will serve as a guideline for future Diversity chairs and committee members in developing a diversity program that will be informative and meaningful to SASFAA members. There were eight questions on the survey, as well as a section for comments. Sixty individuals responded to the result. The results were as follows:

When you hear the word “diversity” what does it mean to you?

The vast majority of the respondents felt that diversity dealt mainly with differences; differences in culture, sexual orientation, race, gender, disability, etc. Acknowledging these differences, respecting these differences and embracing the differences are all part of diversity. Diversity is not limited to people and race, but has many different aspects. A comment was made that it was nice to see a different kind of diversity speaker at SASFAA (referring to Mark Abelsson), although some people were offended because of him being outspoken about homosexuality.

Is diversity important to you? Explain.

The vast majority of the respondents indicated that diversity is important to them because it is important to value and respect the differences that exist among society. Diversity facilitates understanding and makes us more tolerant and accepting of others.

Do you feel that SASFAA promotes diversity? Explain.

Most respondents indicated that they did believe that SASFAA promotes diversity due to the programs and activities offered at the conferences, and having an actual committee for this purpose. A few indicated they felt SASFAA “over” promotes diversity, and some felt that diversity was limited to black and white issues. Also, there were several respondents who felt that SASFAA does not promote diversity, but likes to talk about it.

What activities would you like to see SASFAA sponsors in the area of diversity?

Many respondents suggested general sessions and activities that go beyond racial issues. Some suggestions included legislative issues that impact diverse groups; diversity dance; sensitivity training; cross cultural communication workshops; multicultural meals; promoting minority leadership roles and securing speakers that talk about life experiences. One respondent suggested that maybe it’s time for a “breather” from these sessions.

Would you attend a diversity-related general session/concurrent session at a SASFAA conference? Please explain your response.

The majority of the respondents would attend these type sessions because they realize the value they offer. One comment was made regarding the fact that people who are aware of the issues attend the sessions and those who really need to attend doesn’t attend. So, general sessions may be more conducive to getting more individuals to attend (as long as they are appropriately named in the agenda, referring to the Mark Abelsson session). One respondent indicated that we should do away with these sessions; we are “beating a dead horse”.

What diversity related topics would you like to see addressed at a SASFAA conference?

A variety of topics were suggested including HBCU Minority Recruiting and Retention; sexual orientation issues; Hispanic population; communication skills/techniques; speakers who have had living experiences in another part of the world and ways to inspire more qualified leaders.

List any diversity activities/sessions that SASFAA has done in the past that you have benefited from.

The Multicultural Leadership Symposium was mentioned, as well as Mark Abelsson; Wintley Phipps; Leeza Bruce; the diversity luncheon with Steve Morgan; tour of civil rights museum and the FAFSA workshop.

What does your school or organization do to promote diversity?

Many offer diversity programs and training. Some have diversity organizations and committees within their schools and organizations. There were several that did not do anything to promote diversity.

Comments/suggestions or other feedback you wish to provide.

Several thanked the committee for doing the survey and seeking members input. Other comments were: “Learn to address diversity, not ethnicity. Our focus is too narrow.”

“Keep SASFAA about student financial aid; having sessions relating to diversity is out of line”. “Bring in an individual who can touch the lives of SASFAA members, perhaps someone who has lived in a diverse situation; this usually makes an impact on those listening to the presentation”. “I believe that SASFAA works hard to make diversity not only about race and I appreciate their willingness to continue to do so as well as the willingness to do a survey that will determine the needs of the association”.

The complete survey text will be distributed to the 2005-2006 diversity chair, and should be used as a guide in developing the diversity program for that year.

The Diversity Committee chair would like to thank SASFAA President Janet Sain and the Executive Board for providing her with this opportunity to serve the association. It has been a wonderful year!

Respectfully submitted,

Dee Talley

SASFAA Diversity Chair

**Electronic Services Chair Report**

SASFAA Executive Board

Erik R. O. Melis, Chair, SASFAA Electronic Services Committee

June 2, 2005

Electronic Services Committee Report for June 2005 Transitional Board Meeting

The following updates have been made to the web site, through coordination with ATAC and other SASFAA committees and board members, since the August board report:

* 2005 Conference Mini-Site updated to include conference presentations.
* Online voting was successfully implemented at conference with password retrieval process setup onsite.
* 2005-2006 Sponsorship Form modified as required.
* 2005 NAOW online registration form fully activated.
* Submitted update to Legislative Relations committee chair. Not yet updated on web as of the completion of this report.
* 2004-2005 President’s Annual report posted to web.
* Calendar updates were made on the web site.

The following web-related projects are planned, are in progress or will be continued by the 2005-2006 Electronic Services Committee.:

* Electronic Services, in coordination with the appropriate other committees and board members, will review the functionality of the new SASFAA web site and recommend P&P changes to the various committees now that users have a chance to experience the functionality of the web site. (In progress)
* Will prepare a proposal for disposition processes for obsolete/non-working electronic equipment within SASFAA (In progress)

Throughout the course of the upcoming year, the Electronic Services Committee will continue to work with the elected Board, State Presidents, and Committee Chairs to get input on improvements and updates for the SASFAA web site and to determine ways that the Electronic Services Committee can assist in meeting goals and objectives.

**Special Projects Report**

SASFAA Board of Directors Meeting

**Report of the Long Range Planning Committee**

**June 9 –10, 2005**

**St. Petersburg Beach, Florida**

# March Activities

The Long Range Planning Committee met by conference call on March 29 2005 to review its annual goals and accomplishments for the GAP report due on April 1, to review and revise the membership survey questionnaire and methods for distribution, to review the draft of the History of the Long Range Plan, and to consider the needs for the SASFAA Retreat to be held in November 2005. The committee determined that another meeting was needed in May to analyze the outcomes of the membership survey, to identify the participants for the SASFAA Retreat and to develop the goals and objectives for the 2005-2006 associational year.

The membership survey questions were reviewed and revised. The committee agreed that the survey should be posted for at least three weeks and sent to all members to complete electronically. The committee agreed that President Sain would send the survey link out to the membership as well as to all state presidents. The survey would be posted in April for at least three weeks to encourage full member participation. Responses will be tallied for the committee’s next meeting.

# April Activities

The membership survey was tested by the committee and adjustments made. Following testing, the survey was available for online completion by the membership in April. One hundred and sixty six members responded (166).

The LRP GAP report was submitted on April 1, 2005 to Ron Day, chair of the GAP committee.

The committee’s Budget request was prepared and submitted it to Clark Aldridge, Budget and Finance Chair for the 2005-2006 associational year.

# May Activities

The LRP committee met May 16-17 in Biloxi, Mississippi prior to the MASFAA annual meeting. The committee reviewed the DRAFT History of the Long-Range plan, developed a listing of the SASFAA Retreat participants and considered the logistics and budgetary requirements for the Retreat.

The LRP also reviewed and analyzed the membership survey results. The committee members prepared observations and a executive management summary for the Board of Directors.

Action Items:

1. The Draft History of the Long-Range Plan be approved by the Board of Directors.
2. The results, executive summary and observations of the members responses are provided for the review of the Board of Directors consideration and any follow up action as they deem appropriate.
3. The LRP committee recommends that the SASFAA Retreat be scheduled for November 11th and 12th in Charlotte, NC to be held at the Charlotte Hilton. The LRP committee recommends the members identified on the attachment be invited by President Sain and President-Elect Gibbs to participate in the Retreat. Invitation should be made by June 30, 2005.

The committee membership for the 2005-2006 associational year was reviewed. Juanita Russell will discontinue participation, as she will serve as SASFAA Membership chair. All other committee members would like to continue. The committee plans to meet September 18 and 19th in Charlotte, NC to complete the program agenda and outcomes for the Retreat and to finalize logistics. The committee will also review the GAP report and further assess its relationship to the LRP and make recommendations to the Board of Directors at its meeting scheduled October 28-30 in Memphis, TN.

2004-2005 LRP Committee

Carol Mowbray, Chair, Northern Virginia Community College

Cruzita Lucero, Northeast State Technical Community College

Peggy Lowey-Wellisch, Nova Southeastern University

Jane C. McNaughton, Edamerica

Tom Morehouse, Thomas Nelson Community College

Juanita Russell, Alcorn State University

Betty Whalen, Winthrop University

Janet Sain (ex officio) ECPI College of Technology

**ATTACHMENT D**

**LIASION REPORTS**

**Agency Liaison Report**

**Agency Liaison Report**

**Elizabeth V. McDuffie**

**June 10, 2005**

# Florida Office of Student Financial Assistance (OSFA)

**Theresa Antworth**

The Florida Department of Education, Office of Student Financial Assistance, Scholarship and Grants Office is working to complete the 2004-05 academic year with successful expenditures and data in programs with current year appropriations.

The 2005 Florida Legislative Session made very minor modifications to existing programs and created no new programs. The funding for the 2005-06 academic year has been approved by Governor Bush and awards an approximate 13% increase to student financial aid for a total budget of $527 million. The minor statutory recommendations to current law included (1) program enhancements for our military students participating in the Operation Iraqi Freedom, and (2) recognition of the Advanced International Certification of Education (AICE), an acceleration curriculum, to meet high school eligibility criteria in our merit scholarship program.

### Georgia Student Finance Commission

**Shelley Nickel**

#### Georgia provides $118 million to college students with financial need

Last year, the State of Georgia awarded students with financial need more than $118 million in scholarships and grants through the HOPE and LEAP programs.

* The HOPE Scholarship program awarded over $76 million to more than 31,000 students who also received the Pell Grant, the federal program which serves students with demonstrated financial need. HOPE scholarships are merit based, and are awarded to eligible students enrolled in degree programs at Georgia colleges.
* The HOPE Grant program awarded $41.2 million to more than 41,500 Pell recipients. HOPE grants are awarded to Georgia residents enrolled in certificate or diploma programs.
* $1.46 million was awarded through Georgia’s Leveraging Educational Assistance Partnership (LEAP) program. LEAP, a state grant program that draws federal matching funds, also awards college students with financial need.

#### GAcollege411.org Enhancements

In February 2005, Georgia launched GAcollege411.org, an online resource that helps students plan, apply, and pay for college. The site features career exploration, SAT and ACT preparation, information about 100 Georgia colleges, and financial aid resources. This summer, another important component will be added. Through GAcollege411.org, students will be able to apply online to all of the institutions listed on the site, including public and private colleges and universities and public technical colleges. In coming months, electronic transmittal of high school transcripts will be added to the site’s capabilities.

#### New Service Loan Promotes Careers in Social Work

GSFC is pleased to announce a new pilot Service Cancelable Loan Program designed to attract and retain qualified individuals into the field of social work. GSFC created the program in conjunction with the Department of Human Resources in response to Governor Sonny Perdue's commitment to add 500 new social work positions in the state. The program will be piloted with Georgia State University and will provide $100,000 for service cancelable loans to students pursuing a bachelor’s degree in social work.

#### HERO Grant

Earlier this year, the State of Georgia enacted a law creating the Georgia HERO (Helping Educate Reservists and their Offspring) Grant, an education grant for certain military personnel and their children. Recipients must be members of the Georgia National Guard, or members of a reserve component of the armed forces of the United States, who are deployed overseas for active service in a combat zone for a consecutive period of at least 181 days. Children of such service members are also eligible for this program. The grant award is $2,000 per year for up to four years of study at an eligible college in Georgia.

#### Kentucky Higher Education Assistance Authority

**Michael Morgan**

Thanks to KASFAA President Heather Boutell for attending the February Board meeting and reporting on the KASFAA task force created to work with Senator Tim Shaughnessy to make recommendations for any needed changes to KEES. KEES legislation moving administrative responsibility from CPE to KHEAA and changing reporting requirements for student grades was sponsored by Representative Tanya Pullin and passed by the 2005 Kentucky General Assembly. This is just one more example of how our working together can improve our services to students and schools.

ZipDECISION for Parent Borrowers

Parents using a KHEAA Origination Services lender can now perform an immediate credit pre-approval online. ZipDECISION is available 24 hours a day, 7 days a week.

Parent borrowers may access ZipDECISION in several ways.

* Schools will have the option of placing a URL, provided by KHEAA, on their website for borrowers.
* Borrowers may access ZipDECISION from the KHEAA website ([www.kheaa.com](http://www.kheaa.com/)).
* Borrowers may continue to call KHEAA for an immediate credit decision over the telephone.

Student Aid Advisory Committee

The KHEAA Student Aid Advisory Committee, comprised of financial aid officers from the public, private, and proprietary sectors, met on March 31 at KHEAA. CPE Vice President for Finance Sandra Woodley discussed the forthcoming Affordability Study, a research project sponsored by CPE and KHEAA that will involve data collection from Kentucky financial aid and institutional research offices. Other topics included a KASFAA update; a review of phase one of Zip Access, the redesigned student aid system; borrower benefits; GoHigherKY.org; state and federal legislation; and the status of school-based web services. The next meeting is scheduled for November 10, 2005, at KHEAA. The committee asked KHEAA to consider providing a notice to financial aid offices regarding the most recent PLUS pre-approvals and removing ISIR comment code edits regarding applicants’ citizenship.

KEES Data Report

KHEAA recently released the “2003 Kentucky Educational Excellence Scholarship Data Report.” The standardized 2003 KEES information (presented by school, school district, county, postsecondary institution, and several other variables) is designed to address the most commonly asked KEES questions. (KHEAA will soon publish 2004 KEES data.) The electronic version of the report is available at www.kheaa.com/serv\_reports.html. If you have questions about this report, please contact KHEAA’s Policy Analysis group at (502) 696-7471 or [mletteer@kheaa.com](mailto:mletteer@kheaa.com).

KAPT Board Governance

House Bill 184, passed by the 2005 General Assembly, transfers board governance of Kentucky’s Affordable Prepaid Tuition (KAPT) to the KHEAA Board of Directors effective July 1, 2005. KHEAA currently handles daily administration of the program.

Use of KAPT Benefits

Through March, 119 KAPT beneficiaries had used $579,000 in KAPT benefits for the 2004-2005 academic year. KAPT expects approximately 150 KAPT beneficiaries to use benefits for the 2005-2006 academic year. Financial aid and business officers can access student eligibility and matriculation information through KAPT’s secure eligibility website at www.prepaidtuition.com. For information on using the website, e-mail Jo Carole Ellis at [jcellis@kheaa.com](mailto:jcellis@kheaa.com) or call (502) 696-7442.

KAPT Lawsuit

House Bill 267, the state budget bill, requires KAPT to return $13.7 million from the KAPT Program Fund to the General Fund. In December 2004, the KAPT Board approved the transfer of $13.7 million from the Unclaimed Property Fund to the KAPT Program Fund to eliminate the program’s actuarial deficit. On March 30, the Attorney General filed a lawsuit claiming the return of the funds required by the budget bill is unconstitutional. On April 7, the court approved a temporary injunction barring the return of the $13.7 million until the court rules on the lawsuit. The status of the lawsuit will not affect those students currently using KAPT benefits. At the April 11 meeting, the KHEAA Board directed staff to respond to the lawsuit by April 20.

Interest Rates Reduced

The interest rate for conversion scholarship/loan programs was reduced from 12% to 6%, effective April 1. Participants in the following programs will benefit from this regulatory change:

* Teacher Scholarship
* Math/Science Incentive Loan (no longer funded)
* Osteopathic Medicine Scholarship
* Minority Educator Recruitment and Retention Scholarship (MERRS)
* Occupational Therapy/Physical Therapy (no longer funded)

Zip Access

The certifier piece of Zip Access for the Robert C. Byrd Honors Scholarship, Teacher Scholarship, and Early Childhood Development Scholarship programs was implemented on Saturday, April 2. This feature allows appropriate personnel to certify student applications for each scholarship program online and eliminate the paper certification process.

GoHigherKY.org

GoHigherKY.org continues to receive lots of hits―nearly 4.8 million from June 2004 when it went online through the end of March. Nearly 5,000 accounts have been opened and over 3,700 requests for additional information have been received.

30 Seconds of Fame Competition

KHEAA and The Student Loan People presented a $1,000 check to Fleming County High School on April 13 for taking first place in our statewide “30 Seconds of Fame” competition. Over 60 teams competed in developing an ad campaign for GoHigher.KY.org! The judges were overwhelmed by the enthusiastic response of high schools across Kentucky. Our judges were especially impressed with the talent of the Fleming County team’s creative entry using talking computers to guide students to the Go Higher website. Fleming County’s winning entry will educate Kentuckians about Go Higher.org’s online tools and resources to help students and families learn how to plan and pay for college or technical training.

The College Track Series

KHEAA/KHESLC Executive Director Joe McCormick took part in a three-part series on college access in Kentucky. The first show of the series, “The College Track 101: Who's In, Who's Out,” featured Dr. McCormick, CPE Vice President of Academic Affairs Jim Applegate, and KDE Commissioner Gene Wilhoit as panelists and aired March 22 on Kentucky Educational Television (KET) 1.

**North Carolina State Education Assistance Authority**

**Elizabeth V. McDuffie**

**FAFSA Day**

The fourth annual FAFSA Day attracted over 1,350 students seeking assistance in completing their FAFSA, a 40% increase over the prior year. Host sites reported a total of over 300 volunteers assisting the students and their families. FAFSA Day is co-sponsored by NCASFAA and the State Education Assistance Authority.

**Counselor Internships**

Seventeen counselors have been chosen this summer to receive paid internships in college financial aid offices on 12 campuses. Internships range in length from three to six weeks and participants learn more about financial aid and increase their abilities to help their future high school students.

**CFNC Update**

Over 800,000 accounts have been established on the CFNC site and over 107,000 admissions applications were sent between August 1, 2004 and May 31, 2005. In addition, the Department of Public Instruction is rapidly expanding the implementation of NCWISE software into the public schools in NC, which will enable students to request electronic transcripts to be sent to the colleges within minutes of the request. An estimated 50% of the counties will be operational by December with the remaining due in 2006.

New ads strategies are targeting first generation students to further support North Carolina’s goal of increasing the college-going rate. New TV ads have been developed and bus “wraps” (message applied to outside of bus) are being “rolled” out!

**Program Growth**

Additional programs are being contemplated by the NC General Assembly for implementation in 2005. Most of the programs are workforce development programs as NC attempts to address the teacher and nurse shortage. More information will be forthcoming when the General Assembly adjourns.

**South Carolina Tuition Grants Update**

**Edward Shannon**

The SC Tuition Grants Program is a “need-based” grants program for eligible South Carolina residents attending in-state, independent colleges on a full-time basis. During the 2004-2005 fiscal year, the SC Tuition Grants Program awarded a total of $28.6 million to 12,125 SC students attending the 20 participating SC independent colleges. The average dollar grant amount will be $2,285 and will cover 15.6% of the $14,698 average tuition and fee charge at a SC independent college for the 2004-2005 year.

The SC General Assembly is completing its work on the 2005-2006 state budget. Funding for the SC Tuition Grants Program in 2005-2006 is expected to be similar to the $28.6 million level of the current year. The maximum grant approved for the 2005-2006 school year is $2,600.

A new feature beginning in the 2005-2006 award year is the use of electronic award notifications in place of the normal paper award letters. The SC Education Assistance Authority, the state agency governing the SC Student Loan Corporation, is providing the service at no cost to the SC Tuition Grants Commission. The experience thus far has been that 85% of the eligible students have e-mail addresses (taken from the FAFSA) to which award notifications have been sent. The 15% without e-mail addresses are mailed paper award notifications. The savings to the SC Tuition Grants Commission from postage, paper, and employee work time is significant.

Merit-based programs continue to be highly emphasized in South Carolina. However, statistics reveal that of the 12,125 independent college students receiving the “need-based” SC Tuition Grant, only 40% of these students qualify for merit-based aid from the State of South Carolina. Efforts are being made by the SC General Assembly to increase funding of the “need-based” programs while at the same time continue the funding levels of the merit-based programs.

**Department of Education Liaison Report**

No report

**Lender Liaison Report**

Lender Liaison Report

Jane McNaughton, Chair

June 10, 2005

Jane reported that the new interest rates for FFELP and Direct Loans, for loans first disbursed on or after July 1, 1998 and effective July 1, 2005, will be 4.70% for in-school, in grace and in deferment. The repayment and forbearance rate will be 5.30% and the PLUS rate will be 6.10%. Because of these higher rates, the loan community has seen a increase in the number of consolidation applications by students wishing to lock in the 2.875% fixed consolidation rate through June 30, 2005. The Department of Education is also allowing in-school consolidation of FFELP loans as outlined in Dear Colleague letter GEN-05-08. This guidance from the Department will allow students still attending school to lock in historically low interest rates on FFELP loans.