

**SASFAA Board Meeting Minutes  
Sheraton Myrtle Beach Convention Center  
Myrtle Beach, SC  
February 6-7, 2009**

*Saturday, February 7, 2009*

**CALL TO ORDER**

President Heather Boutell called the meeting to order at 9:05 a.m.

**Action Item:** There were no changes to the agenda and no substitute voting. The Chair declared a quorum.

**Action Item:** Jeff Dennis moved that we approve the agenda with the president authorized to make adjustments to facilitate the flow of business. The motion being seconded by Lisanne Masterson was approved.

**INTRODUCTIONS**

Jeff Dennis, SCASFAA President welcomed us to the great state of South Carolina.

**REPORT OF OFFICERS**

President, Heather Boutell

The following special guests were unable to attend the Board Meeting:

*Jennifer Prince – Student, Horry-Georgetown Technical College*

*Susan Thompson – Director of Financial Aid, Horry-Georgetown Technical College*

The committee chairs were excused and the voting members of the Executive Board meet with the following individuals to discuss the role of federal training at the SASFAA and state conferences:

*Joel Harrell – Federal Student Aid, Region IV*

*Jo Ann Borel – Supervisor, Title IV Regional Training Officers*

*Dave Gruen, NASFAA Chair*

*Dr. Phil Day, NASFAA President*

**Heather Boutell dismissed the group for a break at 10:55am**

**Heather Boutell reconvened meeting at 11:06am**

The committee chairs rejoined the meeting at the conclusion of the prior discussion. Dino Koff, EASFAA President, also joined the meeting at this time.

Dave Gruen, NASFAA Chair, and Dr. Phil Day, NASFAA President, provided a NASFAA Update.

Heather reviewed her written report (see Attachment A and Attachment C).

President-Elect, Keith Reeves

Keith reviewed his written report (see Attachment A).

**AGENDA MODIFICATION:**

The following two reports were moved to after the President-Elect to allow the Treasurer and Membership Chair to leave the meeting after giving their reports to open conference registration:

Treasurer, Terri Parchment

Terri reviewed her written report (see Attachment A).

The Treasurer report will be filed for financial review.

President Boutell asked each Committee Chair and Executive Officer to submit a revised budget to the Treasurer.

Membership, Laura Diven-Brown

Laura reviewed her written report (see Attachment A, B, and D).

**Keith Reeves motioned to take lunch 12:13pm and Jeff Dennis seconded it.**

**Heather Boutell reconvened meeting at 1:10pm**

## **REPORT OF OFFICERS**

Vice President, Sharon Oliver

Sharon reviewed her written report (see Attachment A).

Leadership Symposium, Sharon Oliver

Sharon reviewed her written report (see Attachment A).

Past President, Lisanne Masterson

Lisanne reviewed her written report (see Attachment A).

Secretary, Brad Barnett

Brad reviewed his written report (see Attachment A).

**Action Item: Minutes from the November 2008 Board Meeting were approved**

## **COMMITTEE REPORTS**

Conference, Sandy Neel

Sandy reviewed her written report (see Attachment A).

Sponsorship, Lester McKenzie

Lester reviewed his written report (see Attachment A).

Site Selection, Janet Sain

Janet reviewed her written report (see Attachment A).

Diversity, Dee Talley

Dee reviewed her written report (see Attachment A).

Special Appointee – Management Institute, Brenda Brown

Brenda reviewed her written report (see Attachment A).

## **STATE PRESIDENT REPORTS**

Alabama, Charles Markle

Charles reviewed his written report (see Attachment A).

Florida, Bill Healy

Bill reviewed his written report (see Attachment A).

Georgia, Pennie Strong

Pennie reviewed her written report (see Attachment A).

Kentucky, Jennifer Priest

Jennifer reviewed her written report (see Attachment A).

Mississippi, Marilyn James

Marilyn reviewed her written report (see Attachment A).

North Carolina, Amy Berrier

Amy reviewed her written report (see Attachment A).

South Carolina, Jeff Dennis

Jeff reviewed his written report (see Attachment A).

Tennessee, Jeff Gerkin

Jeff reviewed his written report (see Attachment A).

Virginia, Brenda Burke

Brenda reviewed her written report (see Attachment A).

**Keith Reeves moved to take a break at 2:56pm and Sharon Oliver seconded it.**

**Heather Boutell reconvened meeting at 3:05pm**

## **COMMITTEE REPORTS**

Budget and Finance, Chris Tolson

Chris reviewed her written report (see Attachment A).

Newsletter, Deborah Clark

Deborah reviewed her written report (see Attachment A).

Legislative Relations, Bill Spiers

Bill reviewed his written report (see Attachment A).

Electronic Services, Joe Dobrota

Joe reviewed his written report (see Attachment A).

**Action Item: It was moved by Jeff Gerkin and seconded by Brenda Burke to change the heading of the “Communication (Electronic Services)” section of the Operations Calendar in the SASFAA Policy and Procedure Manual to “Electronic Services.” Motion passed.**

**Action Item: It was moved by Keith Reeves and seconded by Sharon Oliver to remove “Obtain updated membership database from the membership chair and post to website as .PDF document” from each month under the Electronic Services section of the Operations Calendar in the SASFAA Policy and Procedure Manual. Motion passed.**

## **LIAISON REPORTS**

Agency, Tracy Ireland

Tracy reviewed his report, which was not provided to the Secretary prior to the Board Meeting so it is not included in Attachment A.

Lender, Chuck Sanders

Chuck reviewed his written report (see Attachment A).

## **SPECIAL APPOINTEE REPORTS**

All Roads Lead to SASFAA, Joanie Walker

Joanie reviewed her report, which was not provided to the Secretary prior to the Board Meeting so it is not included in Attachment A.

## **UNFINISHED BUSINESS**

There was no unfinished business.

## **NEW BUSINESS**

***Action Item: Keith Reeves moved to approve the following SASFAA Policy and Procedure changes. Sharon Oliver seconded. Motion approved.***

Changes Approved:

- Adding the following to section 6.11: “#8. On June 30 download the membership list to an Excel spreadsheet and send it to the SASFAA Secretary to be archived with that year’s SASFAA information.”
- Adding the following to section 6.16.3:
  - 3) Refunds of vendor/sponsor fees may be considered by written request to the SASFAA Vendor/Sponsor Chair at least sixty calendar days prior to the event. Requests for a refund will be reviewed and voted upon by the President, Budget & Finance Chair, and Vendor/Sponsor Chair. Approved refunds will be made according to the original method of payment (i.e., by check for payments made by check; by credit to account for credit card payments).
- Added the following to section 12.5.1:

1986-87	Palmer Freeman	Leroy Springs Foundation
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- Adding the following to section 12.5.3:

2004	Service to the Financial Aid Profession	NC	Neophyte Listserv - Connecting New Aid Professionals with Veteran Administrators
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- Changed the language in the first sentence of section 12.5.4 to read, “The following is a list of NASFAA Regional Awards that have won by SASFAA.”

President Boutell appointed an ad-hoc committee to review the appendices of the SASFAA Policy and Procedure Manual and provide a recommendation to the Board at the June 2009 Transition Meeting of sections to remove and put on the SASFAA website as stand alone documents. The committee is Brad Barnett (chair), Joanie Walker, Chris Tolson, Keith Reeves, and Jennifer Priest

***Action Item: Amy Berrier moved to adjourn. Sharon Oliver seconded it. Motion passed.***

**ATTACHMENT A  
BOARD REPORTS  
Sheraton Myrtle Beach Convention Center  
Myrtle Beach, SC  
February 6-7, 2009**

**President's Report  
Heather Boutell**

**Summary of Activities**

**GAP 2:** The terms of office for elected officers will be of sufficient length to ensure continuity and to complete the official business while providing opportunities for new leadership.

**GAP 5:** In light of continuing developments within the profession, it is important that the incoming president consider whether or not all committee chairs/liaisons should attend every Board meeting.

**GAP 7:** The Board should consider alternatives to on-site meetings whenever possible to keep costs at the most reasonable level. Such alternatives might include conference calls, electronic mail and arrangement of committee meetings in conjunction with other events where some committee members would normally be in attendance.

President Boutell created a survey that was distributed to the current Executive Board members and Committee Chairs, as well as the past two year's Board members and Committee Chairs, to determine thoughts on the above issues. The survey was distributed on December 5, with a completion due date of December 21. Special thanks to Brent Tener for his work on the survey. 56 people were invited to complete the survey, and 42 people completed the survey. The results are found at the conclusion of my report for the GAP Committee to review. Please review the results and share any issues with me.

**GAP 3:** The President should ensure that all committees' goals and objectives for the year concur with the Long Range Plan and the recommendation of the most recent GAP report.

**PP 6.0:** Develop goals and objectives in keeping with committee/liaison charges, the bylaws, the mission statement and long-range plan and in consideration of the recommendations of the governance and planning committee.

**GAP 4:** The GAP Committee should be provided with a comprehensive list of committee members whether they are new or returning members. Comments on the list should indicate if the member is new or returning.

Board members and Committee Chairs should remember to update their goal spreadsheets with activities from all Board meetings to ease in sending their year-end reports for the GAP Committee. Annual reports are due to President Boutell by Tuesday, April 1. The annual report includes your completed spreadsheet as well as a written year-end report in bullet format of your accomplishments/highlights, along with any recommendations. I would like to request the state presidents provide a report as well outlining their accomplishments and goals for their states, and include anything they'd like in relation to SASFAA.

**GAP 06-07 recommendation:** Attempt, once again, to bring in students to share their success stories as related to receiving financial aid.

President Boutell has invited Jennifer Prince, a student from Horry-Georgetown Technically College, along with Director Susan Thompson, to talk with the Board about what a difference financial aid has made in her life. Student success stories will also be highlighted at the Annual Conference here in Myrtle Beach, SC.

**GAP8:** Continue the development of potential leaders of the Association through workshops, symposiums, conference sessions, etc.

President Boutell attended the SASFAA Leadership Symposium in December at the Grove Park Inn. The event went very well under the leadership of Vice President Sharon Oliver. More information will be provided by Sharon in her report.

**GAP 8:** The professional growth and competencies of members are addressed by offering workshops, seminars, meetings and other training opportunities.

President Boutell attended the SASFAA Management Institute in December at the Grove Park Inn. Special thanks to Brenda Brown for her coordination of our excellent speakers. Survey results were very positive and will be shared in Brenda's report.

**GAP 18:** Ensure that a general membership survey is conducted no later than 2010 and the recommendations from the survey be incorporated into the operational plan of the Association.

Membership Chair Laura Diven-Brown sent out a survey to SASFAA members in December. Her results will be provided in her report. Thanks for her coordination with this effort.

**LRP 5.1:** Identify and finance one individual annually, other than the President-elect or Treasurer, to attend the NASFAA Leadership Conference if never attended previously.

**GAP 10:** Continue to send 5 SASFAA members to NASFAA Leadership Conference. The Committee agrees that is beneficial to send the SASFAA President-Elect in the same year as the State-Presidents-Elect who will all serve on the SASFAA Board at the same time.

President Boutell has received the information from NASFAA to list our attendees at the NASFAA Leadership Conference. The conference is March 8-10 in Washington, DC at the Renaissance M Street Hotel. I have sent the response back indicating Keith Reeves will attend. We have also reserved a space for one more attendee. Based on discussions with Keith Reeves and Chris Tolson, it was decided to send one more person. That person will be determined after the election results.

### **Discussion and Personal Comments**

#### **Welcome to our Conference!**

Welcome to Myrtle Beach! What an interesting journey it's been to get here. While our numbers are not as high as we hoped, I am thrilled we ended up with over 400 professionals who will have the chance to come together. Enjoy your time together and let me know if you have needs.

Words cannot express my appreciation specifically to Sandy Neel and her committee for their hard and creative work to make this conference a possibility. Countless hours have been spent by a dwindling committee to make our time great. Please take the time to recognize them and thank them.

Of course a conference involves many of us – but I want to single out Terri Parchment, Laura Diven-Brown, Janet Sain and Lester McKenzie. As they present their reports, I know you will notice how much they did for SASFAA and for this conference.

#### **Special Guests**

It is indeed an honor to have so many special guests joining us for our meeting. Dr. Phil Day, Dave Gruen, Dino Koff, Kay Soltis and Jim Swanson will all be here in Myrtle Beach with us. Dr. Day is of course of NASFAA President, and Dave Gruen is our National Chair. We welcome Dr. Day from the bustling Washington, DC area, and Dave from the University of Wyoming, “Cowboy Land”, out in Wyoming. Dino joins us from EASFAA, and is the current President of the region. He willingly volunteered to do our pre-conference seminar over a Las Vegas breakfast buffet with me. I am forever indebted. I am scheduled to attend EASFAA in May for my interregional visit. Kay joins us from Pacific Lutheran University in Tacoma, WA, and Jim joins us from Colorado Springs at the University of Colorado. Both serve as NASFAA Board Representatives-at-Large. Please make sure you go out of your way to introduce yourself and share your Southern hospitality.

#### **NASFAA Board Meeting**

It was my pleasure to represent SASFAA at the last NASFAA Board Meeting in November in Savannah, GA. Keith Reeves will provide an update of meeting activities. I did enjoy sharing Paula Deen recipe cards for the Board, and organizing a dinner to Lady and Sons for dinner! My main request from NASFAA was for help with our federal training situation, and representatives are here today to discuss our issues and concerns.

I will attend the NASFAA Board meeting the first week of May in Jackson Hole, Wyoming. If you have issues for me to bring, let me know. Remember that Brent Tener, Dave Mohning, Lisa Tumer, Ron Day, Lisanne Masterson, and Keith Reeves, as observer, will all attend and represent us.

#### **Representing SASFAA at State Conferences**

The highlight of my year has been attending your states and meeting the great professionals we have in our FAA groups. This spring, I look forward to visiting Alabama, Tennessee, Kentucky, Virginia, Florida and Mississippi. Thanks for Keith Reeves for covering North Carolina, South Carolina and Georgia. I can't wait to hear all the fantastic things you are doing in your states.

#### **Next Board Meeting**

Our next, and last, Board meeting will be at the Don CeSar resort in St. Pete Beach, FL, on June 5, 2009. Special thanks to Janet Sain for contacting the hotel and renegotiating our contract to lower our room rate and commitments. Janet will provide more in her report, but the savings will be needed in our budget, and the resort did not want to lose our group due to our history at the location.

**President-Elect's Report**  
**Keith Reeves**

**Summary of Activities**

**GAP6:** The Long-Range Plan must be evaluated and updated every five years. This process should begin no later than 2009 with a new plan to be approved and in place in 2011.

Activity: A special appointee to the board will be appointed in 2009-10 to begin review of the LRP. This appointment will carry over to the 2010-11 board. Ron Day from Kennesaw State has accepted this appointment.

**GAP10:** Continue to send 5 SASFAA members to the NASFAA Leadership Conference. The Committee agrees that it is beneficial to send the SASFAA President-Elect in the same year as the State-Presidents-Elect who will serve on the SASFAA Board at the same time.

Activity: The President-Elect intends to attend the NASFAA Leadership Conference in March 2009.

**LRP3.1:** Assess the purpose and need of each committee when making committee chair/liaison appointments

**LRP3.3:** Consider whether all committee chairs should be in attendance at all Board of Directors meetings, keeping in mind the need to develop future leadership for the Association yet maintaining the ability to conduct business at reasonable costs.

**LRP3.4:** Select an appropriate mix of returning and new committee chairs to ensure that continuity of Association business and the development of future leadership.

**LRP3.5:** Ensure that committee chair appointments, to the extent possible, reflect inclusiveness.

Activity: Returning Chairs: Chris Tolson (Budget and Finance), Joe Dobrota (Electronic Services), Chuck Sanders (Lender Liaison), Deborah Clark (Newsletter), and Janet Sain (Site Selection). New Chairs: Brenda Paganelli (Agency Liaison), Brenda Brown (Conference), Ron Day (Special Appointee). Unfilled Chairs: Diversity, Legislative, and Membership. These positions will be held until the outcomes of the elections are known.

**PP5.31:** Selects committee chairs and members prior to the transitional Board meeting using the volunteer form.

**PP5.32:** Serves as the alternate voting representative to the NASFAA Board of Directors, provides reports of NASFAA activities to the SASFAA Board and publishes reports in the newsletter or on the Web site as appropriate.

Activity: Attended the NASFAA Board of Directors meeting in Savannah November 16-18. Other SASFAA members attending this meeting included: Barry Simmons, NASFAA Chair-Elect (Virginia Tech), Heather Boutell (Bellarmine), Lianne Masterson (Brevard College), Dave Mohning (Vanderbilt), Lisa Turner (James Madison), Ron Day (Kennesaw State), and Brent Tener (Vanderbilt). As you can see, SASFAA is very well represented on the NASFAA Board. Many issues were discussed, including the following:

- Issues schools are facing in light of economic troubles.
- The National Conservation Initiative (NCI) forums continue around the country. SASFAA will participate with forums at the Management Institute in Asheville, NC and at the annual conference in Myrtle Beach, SC.
- The Board was provided a federal update via conference call with Jeff Baker from the US Department of Education.
- A presentation on the status of NASFAA's e-Solutions project which will upgrade all of NASFAA's electronic capabilities.
- Decentralized Training will be converted to webinar format for 2009-10.
- The 2009 Conference will be held in San Antonio, Texas in July. The conference registration fee will not be increased.
- The Finance and Audit Committee proposed increasing institutional membership fees; however, this was referred back to committee for further review.
- Nomination forms for NASFAA elected positions are available on the NASFAA website. Deadline for nominations is December 12.
- The NASFAA staff is working with EASFAA and MASFAA to identify and select conference venues for 2011 and 2012.

**PP5.33:** Represents SASFAA at selected SASFAA affiliated state meetings.

Activity: The President-Elect was designated to attend the Alabama and Tennessee Fall meetings in 2008. Spring 2009 conferences that the President-Elect will attend are Georgia, North Carolina and South Carolina.

**PP5.34:** Consults with the Board and budget chair in developing future initiatives.

Activity: Budget request submitted for advance planning for the 2010 annual conference.

**PP5.36:** Begins initial planning for the next annual conference and for the promotion of the event.

Activity: Conference Chair selected and request for advance planning budget submitted. A site visit of the Louisville Marriott occurred October 10, 2008 in conjunction with the Conference Committee meeting held in Louisville. Due to the current climate, Site Selection Chair Janet Sain has been asked to pursue possible re-negotiation of the contract with the Louisville Hyatt, which is the overflow hotel. We do not currently feel that we will be able to meet the required contracted rooms, which will result in substantial cost to the Association.

**PP5.38:** Conducts an orientation session at the annual conference for state presidents-elect.

Activity: The Presidents-Elect Workshop will be held on Sunday, February 7, 2009. Ron Day is assisting in the coordination of this event. Lianne Masterson and Dave Gelinas will also be involved. Time has also been reserved for the current state presidents to offer words of wisdom and other insights that they have gained from their experience.

### Discussion

Keith attended the MASFAA (Midwest) Executive Board meeting held in Grand Rapids, MI on January 16-18, 2009 as part of the NASFAA interregional visit program.

Future Board Meetings: The August Board Meeting will be held August 7-9 in Louisville, KY (tentatively at the Hyatt). The Conference Committee will meet at the same location August 8-10, 2009.

After review of proposals from several sites – (Hard Rock, Beau Rivage, The Grand, and Treasure Bay in Biloxi and the Marriott in Jackson), The Grand in Biloxi, MS has been chosen as the site for the November 2009 Board Meeting. The Dates are November 6-8, 2009.

The 2009-10 volunteer form is under review and will be available on the Web soon.

## **Vice-President's Report** **Sharon Oliver**

### Summary of Activities

**GAP8/GAP0607/PP:** Continue the development of potential leaders of the Association through workshops, symposiums, conference sessions, etc. Continue the "track" sessions at the annual conference to ensure a good cross-sectional offering to address the various needs of the Association.

**Activity:** An agenda for the one day New Aid Officer's pre-conference workshop has been prepared by Jill Rayner. The workshop will be held on Sunday, February 8, 2009.

**GAP40/LRP12.12:** Continue to provide outstanding training by experienced aid administrators at the NAOW at accessible and affordable sites.

**Activity:** The summer NAOW dates, location and staff have been approved. The workshop will be held at Clemson University on June 14-19, 2009.

**GAP41:** Sites for the NAOW should be selected and confirmed for 2-3 future years. If at all possible, a member of the financial aid staff at selected sites should be involved as a "site coordinator" to assure smooth planning and to facilitate the week's activities.

**Activity:** The VP will work with the Site Selection Committee and make a recommendation for a site and dates for the 2010 NAOW at the June Board meeting.

**LRP42:** Ensure that committees with broadly-defined responsibilities such as legislative relations, professional development, and annual conference include at least one representative from each state in the region. Discuss appointments with the current state presidents at the time of selection.

**Activity:** Changes to the Professional Advancement Committee are included in the announcements presented at this board meeting.

### Discussion

We are anticipating 20 participants in the one day New Aid Officer's Workshop at the SASFAA Conference on Sunday, February 8, 2009. There are seven (7) instructors participating in the workshop delivering the instruction material prepared by our curriculum



coordinator, Jill Rayner. The returning instructor for VA, Marilyn King, resigned. We are anticipating a reduction in the number of participants due to state budget cuts, therefore, we will not seek a replacement at this time.

The Professional Advancement Committee will promote the summer New Aid Officer's Workshop by placing a flyer in the conference bags and information will be disseminated in the Exhibit Area. Also, Clemson has designed a very nice brochure that will be distributed. The Professional Advancement Committee will also hold a luncheon meeting during the SASFAA conference on Tuesday, February 10, 2009.

The SASFAA New Aid Officers' Workshop will be held at Clemson University in Clemson, SC, June 14 – 19, 2009 (Sunday – Friday). The NAOW planning retreat will be held in Clemson, SC on March 13-15, 2009.

### **Leadership Symposium Report** **Sharon Oliver**

#### **Overview**

The Leadership Symposium and Diversity Committee worked extremely hard to identify presenters and sessions that would strengthen the leadership skills of each participant. The purpose of the event was to help prepare selected aid administrators from the SASFAA region to continue or assume leadership positions in the profession. The theme was *'Leading in Challenging Times- Becoming the Person Others Want to Follow.'* Participants were selected by President Boutell and the state presidents. Each participant was notified in advance of assignments and deadlines. The task assigned or listed below:

**\*SASFAA Membership Dues - October 15, 2008**

**\*Contact Sheet - October 17, 2008**

**\*Professional Autobiography 600 words - October 31, 2008**

**\*Read "21 Indispensable Qualities of a Leader" - November 30, 2008**

**\*Movie (12 Angry Men) - December 9, 2008**

**\*Group Report/Presentation/Skit - December 10, 2008**

**\*Journal/Letter - December 8-10, 2008**

The symposium began at 1:30 p.m. on Monday, December 8, 2008 and ended at noon, Friday, December 10, 2008. Participants were advised to be prepared to immerse themselves in the symposium with a minimum of outside distractions. Symposium work did not conclude prior to 9:30 p.m. each evening. Sessions were taught by organizational development professionals from various industry vendors including ECMC, College Foundation, Edamerica and National Student Loan Program as well as by SASFAA institutional members.

The last day of the symposium began with breakfast immediately followed by Group Report/Presentation/Skit that acted as a report on each group's assigned chapters in *21 Indispensable Qualities of a Leader*, concepts gleaned from the various sessions and leadership lessons contained in the movie. Groups were encouraged to be as creative as possible in the format of the report...to identify and illustrate three to six positive 'ah-ha' leadership moments experienced by symposium participants. Each report was limited to five minutes. Participants were encouraged to maintain a journal of their 'ah-ha' moments. The group projects were amazing given the short period of time for the creativity and leadership skills displayed by every group. The group projects were recorded.

## SASFAA Leadership Conference

Monday, December 8, 2008	
1:30 pm to 2:30 pm	Registration
2:30 pm to 3:00 pm	Welcome and Introductory Comments
3:00 pm to 4:00 pm	Effective Communications and Collaborations On-Campus Dr. Phil Day, NASFAA President
4:00 pm to 5:30 pm	Introductions Session I: How to Run a Successful Meeting – Develop Committees (Rose Mary Stelma – CFNC)
6:00 pm to 8:00 pm	Evening Reception
Tuesday, December 9, 2008	
8:00 am to 8:30 am	Continental Breakfast
8:30 am to 9:45 am	Session II: Adding Leadership Skills to Your Management Toolkit (Thomas Rebstock - TG)
10:00 am to 11:15 am	Session III: EQ (Caroline Thornton)
11:15 pm to 12:00 pm	Group Project
1:00 pm to 2:15 pm	Session IV: Leadership Lessons Learned from the Student Loan Scandal (Janet Dobson – NSLP)
2:15 pm to 3:30 pm	Session V: Diversity Panel (Dee Talley)
3:45 pm to 5:30 pm	Movie
6:00 pm to 8:00 pm	Dinner (Movie Discussion – Michael Morgan)
8:30 p.m.	Group Project
Wednesday, December 10, 2008	
8:30 am to 9:00 am	Continental Breakfast
9:00 am to 10:15 am	Session VI: Ethics (Heather Boutell/ Todd Woodley)
10:30 am to 11:30 am	Session VII: Group Projects
11:30 am to 12:00 pm	Wrap-up & Evaluations

### Evaluation

All participants completed an evaluation form which resulted in a response rate of 100%. Tabular response results are included and responses for pertinent questions.

#### \*Years of Financial Aid Experience (4 years to 30 years)

#### \*Event Information

Please indicate your response (1=poor, 3=average, 5=excellent, NA=Not Applicable)

	1	2	3	4	5	NA
Preconference Information & Correspondence (Mailings, email, etc.)			2	6	19	
Conference Packet/ Program			3	6	18	

**\*Sessions**

Please indicate your response (1=poor, 3=average, 5=excellent, NA=Not Applicable)

	1	2	3	4	5	NA
Effective Communications & Collaborations on Campus			4	5	14	4
National Conversation Initiative (NCI) on Access and Aid for Student Success		1	3	12	10	1
NCI Listening Session		1	4	10	12	
Session I: How to Run a Successful Meeting-Develop Committees		1	2	8	16	
Session II: Adding Leadership Skills to Your Management Toolkit				2	23	2
Session III: EQ			4	9	13	1
Session IV: Leadership Lessons Learned from the Student Loan Scandal			3	9	15	
Session V: Diversity Panel		1	1	8	17	
Session VI: Ethics				3	23	1

**\* Other**

Please indicate your response (1=poor, 3=average, 5=excellent, NA=Not Applicable)

	1	2	3	4	5	NA
Movie				3	23	1
Group Projects			2	4	21	
Book			1	3	23	
Meals			1	7	19	
Meeting Facilities				2	25	
Hotel Accommodations				2	25	
Personal Autobiography			4	5	12	6

**\* In what way do you plan to first use the leadership skills you acquired during this Symposium?**

- We have used the generosity skill by donating \$60 to the SASFAA Charity on behalf of the leadership group
- I am going to do a self-evaluation to make sure I am following the 21 qualities as I identify deficiencies, I will develop strategies for improvement
- Focus on management vs leadership qualities
- I now realize the importance of leadership vs management and understanding how the two are so different. I plan on using the tools, supplies and relationships to help improve myself and my organization that I'm a part of.
- Directions with my staff and relations with supervisors. Many of the principles presented also apply to personal life situations.
- Reread book one chapter per week and practice concepts. Share such info w/office and challenge them to practice concepts as well.
- Work on courage! Apply tricks learned here.
- Work on discernment and expressing thanks to staff.
- I have already made changes to my daily activities to become more disciplined. My family and employer will both benefit.
- There is really no easy answer. I hope to take everything back and try to improve.
- To encourage leadership in others!
- I would like to use the skills acquired working with my FAO. As well as sharpening my motivational and aspiring skills without feeling guilty by what others think.
- To run for president elect for 09-10 for NCASFAA.
- Motivate staff. Bring a positive attitude back to the office.
- First by building up fellow staff members at my school.
- New changes that are being implemented in our offices.
- To build courage and security in my daily activities as well as focus and passion.
- I need to make some changes with my relationship with my employees and fellow administrators with regard to servanthood.
- I feel like taking a step back and looking at the big picture.
- Take them back to my team at work.
- I plan to take the recommendation of an individual mentioned in the book to read a chapter at a time and site with it for a while- really trying to identify my areas of opportunity for growth before moving ahead. I also plan to read Maxwell's other books. Great choice for the symposium.
- I plan to acquire more of these skills in work and my everyday life.
- Become more proactive and become more involved than even now.
- I hope to take a great deal not only back to my office, but also to my state conference.

**\*General Suggestions for future SASFAA Leadership Symposiums.**

- Allow a little bit of time for us to enjoy this wonderful facility. Incorporate activities that will allow participants to work with other groups
- The symposium was wonderful. It was motivating and inspiring. The location was absolutely wonderful. I am thankful for the opportunity and will definitely utilize the information obtained.
- The symposium was awesome, wonderful, A +++ and well worth SASFAA time and investment of resources!
- Do not let this training opportunity...Even if a more economical location...even if some the host is...to the universities. This cannot be lost!!!
- More time
- Great event- very beneficial- several qualities/practices shared that will be very beneficial in both my professional/ personal life. Perhaps provide more time during schedule to work on group projects.
- I thank you so much for this opportunity. I believe I will be able to take valuable information. I was also able to build solid relationships with other leaders in the industry. While I deeply appreciate the opportunity to stay at the Grove Park, I wonder if SASFAA could (cut) cost by moving venues. However, I will treasure the memories of staying here. Although the days are full, the association did a great job of fitting in a great deal of information into a short period of time. Thank you, Sharon, for putting so much time into this great event.
- Keep up the great work! This is a needed symposium and I would think that we can all learn how to grow into leaders with the help of our colleagues.
- Start in the evening with introductions and description. To give people time to settle in- check in, get in from the airport, etc. if possible. Thank you for everything! It was wonderful!!!
- Provide Bios/ Autobiography as part of package. Overall the symposium was and planning was outstanding. Thank you for fighting to keep this symposium alive. It is truly needed and helpful! Outstanding job! Exceptional!
- To continue this symposium for future leaders. Each one teach one- I enjoyed networking and meeting other leaders who have the same goals as I do. The journaling helped me also. I will write my letter to myself by the end of the week. I certainly have a fresh outlook on my future as a result of participating in the symposium.
- More time. More interaction with other groups. It was awesome and I thank you! I can't wait to go back to my office and my staff and implement things that I have learned here!
- Just keep them coming!
- Give more information ahead of time- the "secretiveness" didn't seem to add anything to the effectiveness of the symposium- also, I didn't feel like there was any opportunity to get to know anyone outside of my group- I'm not sure I even could pick some of them out in a "lineup!"
- Other than just a little more free time, and do not know how you can improve on perfection! Congratulations on a successful symposium and opportunity to grow professionally! Eye-opening...
- This was a wonderful symposium. It is encouraging to be with future leaders of our association. I would highly recommend it to others.
- It would be good to do an activity or something to enable you to meet, interact and hopefully get to know people outside of your group.
- Keep up the great work!!! And Extend to specific leaders (weak directors).
- Give more time for the EQ completion. I felt rushed and didn't finish. I also felt that it would have been nice to have the Bio info ahead of time and had opportunities to be in setting where I could have gotten to meet more of the participants. Because of the group projects I felt that any free time- i.e. meals- I sat with my assigned group so we could get things done.
- This symposium was a great success! I appreciate the opportunity to be able to attend.
- One recommendation would be to not have the "same" group sit together during the entire symposium. It would be better for folks to network and get to know each other if there were more mixed tables. Great symposium- thank you so much for the opportunity for maintaining this program for SASFAA!
- I really enjoyed this!! I wish it had been spread out over a couple more days, though. But this has been a fantastic opportunity- THANKS!
- More break time- just a few minutes here or there to run up to our room. A great meeting! Thanks for the opportunity! I love the book!

**Past President's Report  
Lisanne Masterson**

**Summary of Activities**

**PP5.71 Serve as a SASFAA voting representative to the NASFAA Board of Directors**

Activity: I attended the NASFAA Conference in Savannah GA, November 16-18, 2008, as a regional voting member of the board.

**PP5.72, PP6.131, PP 6.132, PP6.134, PP6.21 Nominations for SASFAA office.**

Activity: The Nominations and Elections committee met via conference call the end of October to finalize a slate of candidates to be presented to the board at the November meeting. In addition, due to three candidates submitting a request for consideration to be placed on the ballot after the committee meeting, those names were presented to the board for consideration and approval at their November board meeting. Candidates' biographical information and other pertinent data was collected and forward to the SASFAA newsletter editor for inclusion in the next issue of the newsletter.

**PP6.138 A polling place will be established for conducting the election. SASFAA members will, after verification of membership status, be provided an opportunity to vote.**

Activity: Members of the Nominations & Elections Committee (who will be attending the annual meeting) will provide oversight for the on-site voting at the conference

**PP6.22 Make recommendations to the Board for Awards nominees.**

Activity: A follow-up activity since the last board meeting included securing the plaques to be presented at the annual conference.

### **Discussion Items**

#### **NASFAA:**

It was an honor to represent SASFAA at the first NASFAA Board Meeting in Savannah, GA, November 16-18. This is a crucial time for all of us to be involved in steering the direction

#### **2008-09 Committees:**

Nominations & Elections: Those on the committee who will be in attendance at the SASFAA conference will be working the voting area.

Governance & Planning: The committee is finalizing a meeting date for late April, early May. The meeting is tentatively being held in Brevard – hoping to utilize College guest housing for rooms to reduce expenses. In addition, it is a convenient location such that most members would be able to drive easily.

### **Secretary's Report Brad Barnett**

#### **Summary of Activities**

**GAP12:** Members who possess leadership aspirations and capabilities will be identified and developed for significant involvement within the Association.

Activity:

No additional action has been taken during this reporting cycle.

**GAP19:** The membership of the Association should represent the composition of the financial aid professionals in the region.

Activity:

The Secretary will work with the Membership Chair and Electronic Services Chair to see that the membership database is archived at year end in Excel or some other format for ease of determining persistence and other membership statistics. The Secretary has communicated with the Membership Chair who has access to the membership directory. The Membership Chair is able to take a "snapshot" of the database at the end of the SASFAA year. That snapshot will be sent to the Secretary for inclusion in the archived documents for that particular year. A revision to the SASFAA Policy and Procedures Manual has been made to incorporate this process and will be presented to the Board for approval at the February meeting.

**GAP22, GAP23, GAP25, GAP26, GAP27, LRP7.1. & LP7.4:** Policies and procedures are accurate and complete in order to provide consistent Associational direction.

Activity:

The most recently approved version of the SASFAA Policy and Procedures Manual is posted to the SASFAA website. A new version has been e-mailed to the Board prior to the February Board meeting for review, as the Secretary will be seeking approval on additional changes to the manual at that meeting.

A clarification of the responsibilities of the Secretary and the Electronic Services Chair is necessary with respect to posting to the SASFAA Web site. The Secretary, as well as the Treasurer, should have the capability to post to the Web site (through the serve provider, if required). The Secretary and Electronic Services Chair have discussed this issue. The Electronic Services Chair has approached ATAC about allowing some of our members to update items, such as this, on the website. As it stands, ATAC has concerns over security and formatting, so all of these updates must be done by ATAC staff. Keeping the Electronic Services Chair as SASFAA's point of contact with ATAC for updates such as this streamlines the process and reduces the confusion between ATAC and SASFAA.

It is recommended that a procedure be included in the SASFAA Policy and Procedures Manual that details who is responsible for gathering all minutes, reports and other items deemed appropriate by the Board. This person should be identified as the individual charged with having the materials scanned and appropriately archived. No action has taken place on this item.

It is recommended that documents be scanned to CD yearly. This will take place prior to the 2008-09 and 2009-10 transition.

It is recommended that a list of who would keep the CD's and on whose computer they would be maintained be established. No action has taken place on this item.

The Secretary is recommending the removal of many of the attachments in the SASFAA Policy and Procedures Manual for the following reasons:

- Some of the documents are housed in the SASFAA Policy and Procedures Manual and on the website now, which has led in the past to an inconsistency in information as each time an update is made the document has to be updated in more than one place. This is inefficient and SASFAA has experienced confusion in where to find the most accurate information in the past. One document to maintain eliminates this.
- The SASFAA Policy and Procedures Manual has become a "catch all" for various SASFAA documents which may not need to be in there. Having stand alone documents reduces the size of the SASFAA Policy and Procedures Manual which makes it more manageable by all parties using it.
- Stand alone documents provide for easier updating by the various committees and/or board responsible for the updates versus incorporating this into a SASFAA Policy and Procedures Manual review.

**GAP29:** Disseminate quality information to enhance communications among members in a timely and cost-efficient manner.

Activity:

Post the President's annual report to the SASFAA Web site and notify the membership through the SASFAA listserv no later than June 30. The GAP Committee suggests the deadline for the President's report be extended to August 1. A Policy and Procedures change will be required. Discussions with the President and Electronic Services Chair have begun over this topic, but a resolution has not been reached.

The reporting time table process for Board members to send the Secretary their reports before each Board meeting is working well. This was implemented prior to the August Board Meeting.

**LRP8.2, LRP8.3, LRP 8.4, PP 5.61, & PP 5.62:** Maintain the records of the Association.

Activity:

Establish procedures to maintain and archive the records of the Association at the close of each fiscal year. No action has been on this item.

Review periodically the methods for maintaining accessibility, retrieval, security and the location for archival of records. The Secretary reviewed the March 2007 cd that contains scanned documents from SASFAA's history. The cd contains 13,710 individual files, but the file names do not identify the documents scanned. The file names are merely a sequential number indicating the order in which the file was scanned. This makes it impossible to determine what a file is without opening it, and/or where to look on the cd to find a specific file. An attempt has been made to contact Susan Little, who is now retired but chaired this archive scanning project, in order to ascertain if there is any other information available that would help identify the files on the cd. Unfortunately, the Secretary has been unable to reach Susan. The Secretary has another cd that contains 2006-07 and 2007-08 SASFAA information. The files on this cd are named and sorted in subfolders.

The association has many records residing with many committees. The Secretary maintains all records forwarded to him and past on from the prior Secretary. Committee members with documents that need to be a part of the permanent SASFAA record should be forwarded to the Secretary.

All currently approved meeting minutes from the 2008-09 year have been posted to the SASFAA website.

**PP 5.63 & PP 6.41:** The By-Laws will reflect the mission, vision and purpose of the Association and support the viability of the organization.

Activity:

At the August Board Meeting the Secretary submitted names of potential by-laws committee individuals for approval by the Board in order that the committee by review the bylaws governing the Association and recommend necessary changes to the Board. The committee was approved.

It was discovered that the current version of the by-laws (“Revised February 17, 2008, Crystal City, Virginia”) contains a typo in ARTICLE III – PURPOSE (b). ‘

That section currently reads, “(b) assist educational institutions, foundations, government agencies, lending institutions, and provide private and community organizations in promoting and developing effective programs pertinent to student financial aid;”

According to the Articles of Incorporation it should read, “(b) assist educational institutions, foundations, government agencies, lending institutions, and ~~provide~~ private and community organizations in promoting and developing effective programs pertinent to student financial aid;

**PP 5.64:** Orders and distributes the Association's official stationery.

Activity:

It is not necessary to order paper stationery. Instead, the Secretary has updated the electronic letter template and e-mailed this to all applicable individuals. These individuals may print stationery from this letterhead as needed, which is a cost saving measure for the association.

**PP 5.65:** Sends appropriate cards and gifts to members and colleagues on behalf of the Association. Maintains the banner and seal.

Activity:

The Secretary does not possess the banner at this time, but does have the seal.

**PP 5.66:** Facilitates meeting arrangements, including lodging, meal functions and meeting rooms for Board meetings.

Activity:

The Site Selection Committee Chair has assumed primary responsibility for this in 2008-09, but the Secretary will be working in consultation with that chair on these items.

**PP 5.67:** Prepares and distributes agendas in advance of Board meetings.

Activity:

The President e-mailed a copy of the agenda for the February meeting to the board prior to the meeting. The agenda was also included as the page of the compiled reports e-mailed to the Board prior to the meeting.

### Discussion

No discussion at this time.

## **Treasurer's Report Terri Parchment**

### Summary of Activities

**PP 5.51:** Receives and disburses monies of the Association.

Activity: Provided payment for Expense Reports to date. Deposited funds to date.

**PP 5.52:** Pays the bills of the Association within thirty (30) days.

Activity: All bills have been paid upon receipt.

**PP 5.53:** Receives meeting registrations and membership dues.

Activity: Membership dues and meeting registrations are actively coming in to the Treasurer and being processed as received.

**GAP49:** Recommend that quarterly budget statements continue to be posted on the SASFAA Web site.

Activity: Quarterly budget statements are posted on the SASFAA Web site as instructed.

**SASFAA, Inc.**  
**Budget vs. Actuals: SASFAA - FY09 P&L**  
**July 2008 - June 2009**

	Total			
	Actual	Budget	\$ Over Budget	% of Budget
<b>Income</b>				
01 Membership Dues	24,550.00	37,500.00	-12,950.00	65.47%
02 Professional Development	12,250.00	106,500.00	-94,250.00	11.50%
03 Annual Meeting	74,700.00	168,750.00	-94,050.00	44.27%
04 Vendors/Sponsors/Patrons	78,423.67	108,625.00	-30,201.33	72.20%
05 Advertising	25,247.33	30,000.00	-4,752.67	84.16%
07 Interest Earned	18,886.69	25,000.00	-6,113.31	75.55%
08 Miscellaneous Income	5,262.00	5,190.00	72.00	101.39%
09 Balance Forward		45,000.00	-45,000.00	0.00%
<b>Total Income</b>	<b>\$ 239,319.69</b>	<b>\$ 526,565.00</b>	<b>-\$ 287,245.31</b>	<b>45.45%</b>
<b>Expenses</b>				
101 President	6,865.10	13,700.00	-6,834.90	50.11%
102 President-Elect	3,662.95	9,100.00	-5,437.05	40.25%
103 Vice President	1,245.41	4,000.00	-2,754.59	31.14%
104 Secretary	2,078.79	4,600.00	-2,521.21	45.19%
105 Treasurer	2,260.36	5,900.00	-3,639.64	38.31%
106 Past President	3,874.76	8,000.00	-4,125.24	48.43%
201 Membership	1,640.38	7,000.00	-5,359.62	23.43%
202 Electronic Services	7,443.62	12,250.00	-4,806.38	60.76%
203 Professional Advancement	19,687.17	161,500.00	-141,812.83	12.19%
204 Newsletter	667.48	2,375.00	-1,707.52	28.10%
205 Budget and Finance	3,324.44	6,100.00	-2,775.56	54.50%
206 Annual Meeting Program	26,667.45	178,000.00	-151,332.55	14.98%
207 Site Selection	545.70	2,000.00	-1,454.30	27.29%
208 Nominations and Elections		100.00	-100.00	0.00%
210 Executive Board	12,539.00	41,090.00	-28,551.00	30.52%
211 President's Contingency	731.60	2,000.00	-1,268.40	36.58%
213 Advance Program Planning	676.71	3,000.00	-2,323.29	22.56%
214 Diversity Issues	2,147.52	5,000.00	-2,852.48	42.95%
216 Legislative Relations	1,513.94	2,850.00	-1,336.06	53.12%
217 Long Range Planning		2,000.00	-2,000.00	0.00%
218 Vendor/Sponsor/Patron	1,364.66	4,500.00	-3,135.34	30.33%
219 Special Projects	33,969.74	42,000.00	-8,030.26	80.88%
224 Accounting Fees and Taxes	2,000.00	7,000.00	-5,000.00	28.57%
225 Online Payment Processing Fees	1,008.10	2,500.00	-1,491.90	40.32%
<b>Total Expenses</b>	<b>\$ 135,914.88</b>	<b>\$ 526,565.00</b>	<b>-\$ 390,650.12</b>	<b>25.81%</b>
<b>Net Operating Income</b>	<b>\$ 103,404.81</b>	<b>\$ 0.00</b>	<b>\$ 103,404.81</b>	
<b>Net Income</b>	<b>\$ 103,404.81</b>	<b>\$ 0.00</b>	<b>\$ 103,404.81</b>	

Tuesday, Feb 03, 2009 07:17:07 PM GMT-6 - Accrual Basis

Total Cash on Hand as of February 3, 2008:

BB&T Savings:	\$50,538.20
Fifth Third Savings:	\$18,914.26
Fifth Third Checking:	\$120,939.51
	<u>\$190,391.97</u>



## SASF AA Endowment

		<b>Date Purchased</b>	<b>Maturity Date</b>	<b>Amount</b>	
<b>Chestatee Bank</b>		11/30/06	11/30/2007	\$ 65,000.00	
Balance at 5/30/07	\$ 66,627.75				
Interest earned					
6/30/2007	\$ 278.79				
7/30/2007	\$ 269.79				
8/30/2007	\$ 278.79				
9/30/2007	\$ 278.79				
10/30/2007	\$ 269.79				
11/30/2008	\$ 278.79				
<b>Haven Tr. Bank</b>		11/30/2007	12/7/2010	\$ 65,000.00	
Interest earned					
1/7/2008	\$ 248.42				
2/7/2008	\$ 248.42				
3/7/2008	\$ 232.40				
4/7/2008	\$ 248.42				
5/7/2008	\$ 240.41				
6/7/2008	\$ 248.42				
Balance at 6/30/08	\$ 69,748.98				
		<b>Date Purchased</b>	<b>Maturity Date</b>	<b>Amount</b>	
<b>Flagstar Bank</b>		7/25/2007	7/24/2009	\$ 50,000.00	
Balance at 6/30/07	\$ 52,356.29				
Interest earned					
1/25/2008	\$ 1,323.29				
accrued at 6/30/08	\$ 1,136.30				
Balance at 6/30/08	\$ 54,815.88				
Total Endowment	\$ 124,564.86			\$115,000.00	\$ 9,564.86

### Conference Committee Report Sandy Neel

#### Summary of Activities

**GAP28-32, 39, LRP12.2, 12.3, 12.7, PP 6.67 & PP 6.68:** The professional growth and competencies of members are addressed by offering workshops, seminars, meetings and other training opportunities.

**Activity:** The 2009 SASFAA Annual Conference is here. The theme of the conference is “On Deck With SASFAA – Building a Field of Dreams.”

The conference committee has worked hard to develop a quality program to meet the professional development needs of our membership while also providing opportunities for networking and fellowship.

There are 55 concurrent sessions planned for the conference. We are very fortunate to have Greg Martin and Jeff Baker at the conference to provide the federal update and training on the TEACH grant and other federal programs. We also have a pre-conference workshop on Financial Planning and Debt Management presented by Dino Koff, Financial Aid Director at Dartmouth Medical School. Our traditional New Aid Officer’s Workshop will be held on Sunday along with the state president-elects workshop. Dr. Phil Day, NASFAA President and CEO is joining us and providing us with a “Washington Perspective” followed by “Starting a NASFAA Conversation: NASFAA and the Future of Financial Aid on Monday morning.

**LRP4.2 & PP 6.61:** Committees should be of sufficient size and number and represent the diversity of the membership to accomplish the goals of the Association and to develop future leadership while being fiscally responsible.

**Activity:** This has been accomplished and the committee members were approved by the Board.

**LRP5.5:** Members who possess leadership aspirations and capabilities will be identified and developed for significant involvement within the Association.

**Activity:** The configuration of the Conference Committee meets these standards. Three people on the conference committee has had limited exposure to SASFAA.

**LRP14.1:** The future financial stability of the Association is provided through careful and regular planning and evaluation.

The Board decided to raise the conference fee to \$225 for this conference.

At the beginning of the conference planning a zero-based budget was created to assist in planning and monitoring of the conference committee expenses.

I am proud to say that it appears we will come in under budget for the conference. The following is an example of what are normal “big ticket” items:

- VIPs Treatment has come in under budget
- Special Events should finish right at their budget
- Conference Bags were much less expensive this year. We ordered 700 bags and will have enough to pass on the other SASFAA events..

**PP 6.60 & 6.601:** Review evaluations from the prior year conference to assess interest and need for appropriate adjustments for current conference plans and prepare a conference evaluation for use by the next conference chair.

**Activity:** This was accomplished and the 2010 Conference Chair, also a committee member on this year’s committee, is responsible for conducting the post-conference evaluations this year.

**PP 6.62 & PP 6.64:** Disseminate quality information to enhance communications among members in a timely and cost-efficient manner.

**Activity:** The SASFAA listserv, SASFAA state listservs, and SASFAA newsletter were used to disseminate information regarding the conference.

**PP 6.65:** Fiscal integrity will be ensured.

**Activity:** A zero-based budget was created to assist in planning and monitoring of the conference committee expenses.

**PP 6.66:** Maintain the records of the Association.

**Activity:** Records are being maintained throughout the conference planning process and the Conference Guide will be update before being passed to the 2010 Conference Chair.

**PP 6.69:** Coordinate conference activities with the sponsorship, professional development, finance and audit, membership and local arrangements committees.

**Activity:** Activities were coordinated with appropriate individuals.

### **Discussion**

This has been a very difficult year to plan a conference for the committee. People who were committed to presenting sessions had to back out due to budget constraints so up until the very last minute the committee was working hard to find quality sessions to meet the needs of our membership. The whole committee needs to be commended on their dedication and hard work.

**Recommendations:** Although I understand the need to get new people involved, I feel it is very important that those selected for the conference committee have at least served on a state conference committee. Being on the SASFAA Conference Committee is a very big commitment so understanding this commitment is vital to the whole committee.

This year we asked the hotel to require one nights deposit on each room reserved. This was probably not the best year to implement this however when we started we could not have predicated the budget crisis many schools are facing. Several people commented on the fact that they were being charged up-front and wouldn't be reimbursed by their school until the travel was completed. This could have contributed to our room block being so low. We have been very fortunate that the hotel extended the room rate until the hotel was sold out. SASFAA should review this process.

We are very pleased that Recording for the Blind and Dyslexic-Learning Trough Listening or RFB&D was selected as our community service project this year. RFB&D is a nonprofit organization and the nation's leading educational library serving people who cannot effectively read standard print because of visual impairment, learning disability-such as autism, dyslexia, or other physical disability. RFB&D serves all educational levels, from kindergarten through post-graduate school and beyond, in a broad range of subjects, providing navigational audio textbooks read by trained volunteers familiar with the subject areas of the texts. Like SASFAA RFB&D provides resources to students. It is recommended that SASFAA find charities each year, like this one, that supports education.

## **Membership Report** **Laura Diven-Brown**

### **Summary of Activities**

**LRP6.1** : Seek to increase membership.

Activity: Our friendly state membership competition compares 2008-09 membership numbers to the 2007-08 numbers. The state with the highest percentage increase at year-end will be recognized as the winner. However, it does not appear that any state will exceed last year's numbers.

#### Current 2008-09 membership by state Comparison to 2007-08

State	As of 1-26-09 2008-09	As of 2-12-08 2007-08	Overall 2007-08*	Difference from last year's final numbers	Percentage of 07-08 Reached
Alabama	56	70	90	34	62.22%
Florida	145	217	249	104	58.23%
Georgia	137	179	198	61	69.19%
Kentucky	85	105	113	28	75.22%
Mississippi	42	59	77	35	54.55%
North Carolina	140	172	180	40	77.78%
South Carolina	124	161	167	43	74.25%
Tennessee	130	137	146	16	89.04%
Virginia	145	175	186	41	77.96%
Out of Region	64	133	151	87	42.38%
Not Specified	25	25	25	0	100.00%
TOTAL	1093	1433	1582	489	69.09%

Tennessee is currently winning the state competition with 89.04% of last year's numbers reached.  
Virginia is in second with 77.96%.

However, overall membership is down 24% from the same time last year.

Of those members who have specified an institution type, comparison results to last year are as follows.

<b><u>Institution Type</u></b>	<b><u>2008-09 To date</u></b>	<b><u>2007-08 as of 2-12-08</u></b>	<b>Difference</b>
Lender/secondary market/servicer/guarantor	168	347	179
School representatives	789	888	99
Government/consultant/other	70	113	43

For 2008-09, although school representatives are only at 89% of their numbers from the same time last year, the most significant drops can be seen in the lender/secondary market/servicer/guarantor population (48% of last year's figures) and people classified as "government/consultant/other or not specified" (62%). The changes may be due to job losses and instability in the lending community.

**GAP15, GAP16, GAP18, LRP6.2 (same as GAP15), LRP6.3:**

- Undertake a review of the membership categories for appropriateness at least once every five years.
- Review the membership structure at least once every five years to determine if membership should be individual, institutional or on some other basis.
- Ensure that a general membership survey is conducted no later than 2010 and the recommendations from the survey be incorporated into the operational plan of the Association.
- Conduct a survey at least once every five years to determine membership needs that is scheduled two years before the effective date of the next 5-year Long-Range Plan.

**Activity:** The President asked the Membership Committee to prepare an online Member Survey (See Attachment A, B & D). This survey was emailed to all individuals in the SASFAA database who were members during either 2008-09 or 2007-08. Data was collected beginning December 16, 2008, through January 15, 2009. Questions were asked about membership structure and categories in addition to opinions of possible fee increases, satisfaction with association services, and suggestions for staying financially sound. 422 responses were received. As a token of appreciation, members had the chance to win a \$25 Visa gift certificate by completing the survey and providing their email address. A random selection process was established and the winner was notified: Glenda Latimer of Jackson State University in Mississippi. A full report of the survey findings will be presented at the next Board Meeting.

**GAP17, GAP19:**

- Continue to analyze the membership database, following up on recommendations made by membership chair to make sure the database is setup to accurately record and archive the SASFAA active membership for each and every year. This will then make it possible to make accurate comparisons from year to year. GAP recommends this task be given to one individual as a special appointee to fully examine the existing database and functionality.
- The membership database should be archived at year end in excel or some other format for ease of determining persistence and other membership statistics.

**Activity:** The Chair confirmed with the Secretary that a year-end snapshot of the database will be provided June 30. In addition, the ability to study persistence was further enhanced this year when ATAC added a new database indicator of whether a member was paid for 2008-09. This indicator will be available in future years as well.

**PP 6.114:** Assist the treasurer with on-site registration at the annual conference.

**Activity:** The chair and the treasurer have been in contact regarding preparations for registration. This year, the Membership Committee was tapped to assist with shifts at the "paid" registration area. Although several committee members are unable to attend the conference due to institutional budget constraints, at the time of this report, 5 members were planning to volunteer (AL – Melba Maudlin, GA – Letrell Thomas, KY – Marion Shute, SC – Melanie Gillespie, and VA – Sheila Nelson-Hensley).

**PP 6.115:** Provide a list of conference registrants to conference sponsors upon request, to include: first name, last name, title, institution, street address, city, state, zip, email address, and institution type.

**Activity:** To date, the Chair has responded to 22 requests for registrant information since January 1, 2009.

**PP 6.117:** Download the membership list to a personal computer on a periodic basis (twice a year at minimum) and maintain the most recent copy until the next download occurs.

**Activity:** Since the SASFAA Board Meeting in November, the database was copied to a PC twice, the most recent being January 26, 2009.

**Other activities**

Set up 2 sessions as part of the Conference Committee.  
Purchased materials for conference nametags.

**Summary of the 2008-09 Member Survey**

(See Attachment D for details)

At the November 2008 SASFAA Board Meeting, President Heather Boutell asked the Membership Committee to prepare an online Member Survey. The survey was to be conducted prior to the February 2009 Conference.

This survey was emailed to all individuals in the SASFAA database who were members during either 2008-09 or 2007-08. 1887 emails were sent, with 2 subsequent reminders. Data was collected beginning December 16, 2008, through January 15, 2009. Questions were asked about membership structure and categories in addition to opinions of possible fee increases, satisfaction with association services, and suggestions for staying financially sound.

As a token of appreciation, members had the chance to win a \$25 Visa gift certificate by completing the survey and providing their email address. A random selection process was established and the winner was notified: Glenda Lattimore of Jackson State University in Mississippi.

### **Survey Findings**

(See Attachment D for details)

422 responses were received, resulting in a 22% return rate.

It must be noted that the respondents are not necessarily a representative group of the entire SASFAA membership which currently totals 1147.

### **Demographics:**

The vast majority of respondents were from schools – 326 (77%). There were also 74 lender/servicer/guarantor-related individuals and 22 government/consultant/others.

253 (60%) of the respondents had over 10 years of experience in financial aid.

258 (61%) of the respondents had participated in SASFAA 10 years or less.

314 (74%) indicated that they were not currently serving SASFAA as either a moderator, presenter, event sponsor, committee member, chair, state president, or officer. Committee member was the most frequent response for those who did volunteer (64), with 31 people indicating they served as a speaker.

239 (57%) indicated that they had not served SASFAA in the past as either a moderator, presenter, event sponsor, committee member, chair, state president, or officer. Committee member was the most frequent response for those who did volunteer (127), with 116 people indicating they served as a moderator.

### **Membership Intentions:**

398 (94%) said they were paid members of SASFAA (or were joining to join). Only 24 respondents were not planning to renew this year.

Regarding reasons for not renewing, the two most selected answers were: they were either not attending the conference in February (25) and/or their organization would not fund them to participate in SASFAA activities (21), which could be related reasons. When asked to comment, most individuals cited budget problems.

The members were asked about whether SASFAA membership has value even if you do not attend the conference. 387 (92%) said yes.

When asked to elaborate about SASFAA's value beyond the conference, 214 responses were posted. Mention was made of the other training programs that SASFAA offers (such as NAOW, Mid-Level, Leadership Symposium, Management Institute) as well as professional development (leadership) opportunities and legislative advocacy. The overwhelming theme, though, was that SASFAA provides an avenue for information-sharing and networking. There was frequent mention of the listserv in this regard.

- *"Information exchange via listserv and newsletters alone are worth the \$25."*
- *"The information and family feel from the Listserv are hard to find anywhere else!"*
- *"Membership helps young professionals establish relationships, both personal and professional, that will serve them well during their years in financial aid. It provides a forum for institutions to learn from the best practices of others..."*
- *"It's a great way for peers to communicate and assist each other."*

Opinions to the contrary included the following:

- *"It was discussed in our office this year that we do not receive much as a member unless we can afford to go to the conference or other training. This year with the economy the way it is and budgets having to be cut, we contemplated paying the membership again. It is very hard to get much out of the state or regional organizations unless you have the time to participate...."*
- *"I can get what I need from NASFAA."*

- “I obtain as much information and more networking opportunities from my state organization.”

### **SASFAA Programs:**

Respondents were asked about the quality of various SASFAA programs and their plans for attendance.

#### **Which of the following SASFAA programs will you attend during 2008-09?**

21	SASFAA Leadership Symposium	32	SASFAA Management Institute
214	SASFAA Annual Conference	16	SASFAA New Aid Officers Workshop

#### **Please rate the quality of the programs listed below that you have attended previously.**

	Excellent	Above Average	Average	Below Average	Poor	Never Attended
SASFAA Leadership Symposium	42	13	3	0	0	218
SASFAA Management Institute	42	16	5	0	0	216
SASFAA Annual Conference	159	120	32	0	0	58
SASFAA Mid-Level Managers Institute	16	21	7	0	0	230
SASFAA New Aid Officers Workshop	136	35	13	0	0	146

None of the programs received a rating that was “Below Average” or “Poor”. The most frequently reported rating was “Excellent”.

### **SASFAA Fees:**

73% of the respondents indicated that the conference fee was “about right”.

#### **The current conference fee is \$225. Is this fee:**

79	Too high	290	About right
13	Low – but please leave it as is	17	Low - it would be OK to raise it in the future if needed

99% thought the membership fee was “about right” or low.

#### **The current membership fee is \$25, and this amount has not been changed in many years. Is this fee:**

5	Too high	206	About right
72	Low – but please leave it as is	133	Low - it would be OK to raise it in the future if needed

Most people recommend that the membership fee increase to no more than \$30 - \$40.

84% stated that their organization pays (or reimburses) for their SASFAA membership.

Opinion was split over the philosophy of fees being raised. Surprisingly, few respondents brought up the issue of using SASFAA’s reserves. In general, the theme was: *“Before raising fees, we must consider the effects of members institutions ability to pay and the effects it will have on members ability to attend the conference.”*

#### **As SASFAA strives for financial stability in the future, what is your general opinion of fees being raised?**

152	Fees should not be raised since many organizations have cut budgets, including travel to attend professional activities	26	Fees should not be raised because SASFAA can tap its reserves to support itself right now
134	Fees can be raised if needed since vendor support is declining	54	Fees can be raised since they are already low

In general, few comments were provided on ways to increase revenue (67 received) and decrease expenses (79).

Most revenue recommendations focused on:

- Raising or restructuring fees
- Fundraising (raffles, SASFAA t-shirts, events such as golf tournaments or pancake suppers)
- Pursuing a different breed of vendor/sponsor (insurance companies, financial planners, software providers, consultants, office supply companies, national sponsors like Coca Cola)
- Applying to a foundation for funds

Reducing expenses emphasized:

- Finding more inexpensive locations for the conference (universities, state parks, convention centers)
- Trimming the conference by one day
- Cutting back on meal/beverage costs at events (less expensive options, fewer provided meals)
- Reducing travel, particularly for the President (who visits the state conferences) and Committee Chairs
- Electronic ways of doing business such as conference calls and webinars
- Going “back to the basics” and identifying “core values”

Opinion was also divided on the issue of whether to adopt institutional membership, with 57% against. This item raised a lot of questions among the members, with some wondering if it would save them money and others certain that it would cost them more. Perhaps a task force could research this matter further. Comments included:

- “No - I think individual membership keeps individual more directly involved.”
- “No - Talk to RMASFAA – it does not work.”
- “No - ...the decision to join may be taken out of my hands and put into the hands of my supervisor...”
- “Yes – If it is institutional, my school will pay for it. If it’s individual, I have to pay for it out of pocket.”
- “Yes – Only if the rates are reasonable.... NASFAA is really unreasonable.”
- “Yes – You could add members and give a group rate.”

75% did not believe membership dues should be different for certain individuals versus others (school representatives versus non-school). While some saw it as an opportunity for revenue, most thought it was an equity issue.

- “A little common sense and equality please.”
- “Every organization is suffering in this economy... try to keep costs low for everyone...”
- “... all members are financial aid professionals serving students in some capacity, so I think they should be assessed the same fee. When it comes to lender(s)...., many of them already contribute through sponsorship anyway (which is not true for schools), and should not have to pay a differential membership rate as well.”
- “I think each member should be an equal member regardless of their ‘work’ affiliation. We have so many members that are non-school folks who provide their time and commitment to the association that we could never fill all of their positions with school-folks. Why should they pay more when they give so much?”
- “We want to build one community...”

The largest number of comments spoke to the issue of institutional/organizational budget cuts.

- 84% indicated that they have been impacted.
- Respondents listed operating budget cuts, hiring freezes, salary reductions, lay-offs, and reductions in state financial aid and scholarship dollars available to students. Travel restrictions were mentioned heavily.

### **SASFAA services:**

Networking opportunities, the listserv, and the newsletter were seen as valued benefits of SASFAA membership.

**Please indicate which of the following SASFAA benefits you consider the most valuable by rank ordering their importance to you. (“1” is considered the most important service, “9” is of least importance to you.)**

SASFAA member searches on the web	Average rating 5.47 (of those who ranked)	Ranking 7
SASFAA listserv – reading financial aid news and association announcements	Average rating 3.28	Ranking 2***
SASFAA listserv – learning about job openings	Average rating 5.95	Ranking 9
SASFAA listserv – being able to post messages to the membership	Average rating 5.27	Ranking 5
SASFAA newsletter	Average rating 4.27	Ranking 3***
The opportunity to network with colleagues	Average rating 2.60	Ranking 1***
The opportunity to volunteer at an event or	Average rating 5.49	Ranking 8

on a committee		
The opportunity for leadership development as a SASFAA officer	Average rating 5.30	Ranking 6
The opportunity to support SASFAA in legislative advocacy efforts	Average rating 5.23	Ranking 4

Webinars were recommended as a way to expand SASFAA's offerings. In general, no other suggestions were made.

**Would you suggest that SASFAA expand its offerings to include any of the following? Check all that apply.**

312	Webinar training	159	Scholarships to attend SASFAA events
134	A structured mentoring program	<input type="checkbox"/>	Other (23 received)

The final comments were generally words of praise for the association. Most had great things to say about their overall SASFAA experience along with mention of their favorite events.

- "...I have always been so proud of the people and programs of SASFAA. "
- "I've been a member of another regional FAA group and SASFAA is by far superior...."
- "SASFAA has been a blessing to me and the contacts I have made through the association are priceless."
- "The summer institute was a wonderful experience for me a few years back."
- "Leadership Symposium was incredible and should be retained."
- "The annual conference is awesome each year."

However, sprinkled throughout were a few words of caution about the future relevancy of the association.

- "I think that SASFAA... needs to reevaluate its purpose and mission in light of the times we are in. What is the 'need' for SASFAA, NASFAA, state associations?"
- "I realize as I complete this that FSA is offering training that we consider quite valuable and could displace SASFAA further as a resource. Consider how to define SASFAA's niche..."
- "In these challenging times, I think ALL professional organizations are going to have to justify their existence and their cost to the members and their institutions..."

### Vendor/Sponsor Report Lester McKenzie

#### Summary of Activities

**GAP52:** The future financial stability of the Association is provided through careful and regular planning and evaluation.

**Activity:** The vendor/sponsor chair contacted by email and/or phone all vendors from the 2007 and 2008 annual conference to seek their continued support of SASFAA. In addition, vendor/sponsor chair contacted all 2008 (167) financial supporters/exhibitors of NACUBO and AACRAO to seek their support of the association. Furthermore, the vendor/sponsor chair contacted all lenders in the top 150 volume list from the Department of Ed, all guarantors listed on Department website, and all servicers and collection agencies listed on [www.finaid.org](http://www.finaid.org). The vendor/sponsor chair copied the President on all email correspondence.

**PP 6.161:** Disseminate quality information to enhance communications among members in a timely and cost-efficient manner. Develop materials and brochures for potential contributors.

**Activity:** Created email correspondence to engender support from agencies that have supported association in the past and those that have not. In the correspondence, the vendor/sponsor chair detailed our association which included the leaders of state, regional and national associations from our region, the number of institutions and members that are impacted by the association.

**PP 6.166:** Prepare and mail solicitations of sponsorship opportunities to potential sponsors.

**Activity:** Emailed sponsorship structure and current sponsorship opportunities to all 2008 NASFAA attending sponsors and 2007/08 and 2006/07 SASFAA vendors/sponsors.

**PP 6.169:** Serve as the liaison to the conference committee for sponsorship needs and effective use of exhibitor spaces.

**Activity:** Worked remotely with conference chair, membership chair, Treasurer and President to coordinate details of conference exhibiting, space allocation and financing. Coordinated with external drayage company to handle the exhibitors, conference signage and registration counters.



**PP 6.1610:** Disseminate quality information to enhance communications among members in a timely and cost-efficient manner.

**Activity:** Worked with drayage company to design a floor plan for the vendor area at the Annual Conference. After consulting with Conference Chair and President, it was determined that the vendor area be placed in the Ballrooms as opposed to the Exhibit Hall due to enormous size of Hall and potentially small pool of vendors.

**PP6.1612** All sponsors will be recognized in the conference program for their contributions. To receive such recognition, a commitment for the sponsorship of the event must be made by the time the program is prepared for printing.

**Activity:** Worked with conference chair and conference committee to provide program ads in advance of publishing deadline for inclusion in conference program.

**PP6.1613:** Each sponsor will be provided with a directory of attendees.

**Activity:** Worked with membership chair to identify exhibitors meeting eligibility criteria for directory access.

### Discussion

Vendor/Sponsor Income: In lieu of recent market activity and changes in the lending environment, special consideration of external assistance may be necessary to assist in attracting new and different clientele necessary to financially support future conference and association activities.

## **Site Selection Committee Report** **Janet Sain**

### Summary of Activities

**GAP41, LP12.12, P6.156:** 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.

**Activity:** Site Selection committee reviewed the bids presented by UNC-Asheville, UNC-Wilmington, Furman University and Clemson University. Due to circumstances, UNCW and Furman withdrew their bids for consideration in 2009. They both expressed desires to be considered for 2010. Once campus visits were completed, the final recommendation to the board was for the 2009 NAOW workshop to be at Clemson University. The vote was made and Clemson was selected.

**GAP41, LP12.12, P6.156:** 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.

**Activity:** The Site Selection chair has received bids from The Grand Casino and The Beau Rivage in Biloxi and the Marriott in Jackson, MS to hold the November 2009 Executive Board meeting. After comparison charts were completed including room rates, meals and flight costs, The Grand Casino in Biloxi, MS was selected by the President-Elect and Site Selection chair as the most cost effective for SASFAA.

**P6.155:** Work to secure final contracts for the president's signature.

**Activity:** Amended contracts for the 2009 Transitional Board Meeting to be held in St. Petersburg Beach, FL at the Don CeSar Resort Hotel and the Hyatt in Louisville, KY for the 2010 Annual Conference are both being negotiated at this time. Final amended contracts will be presented to the President for signatures as soon as they are completed. These amended contracts include reduction of room block numbers at The Don and at the Hyatt, reduction of the room rates at The Don, and the increase in food and beverages expenses.

**P6.156:** Assist the vice president in the selection of a summer workshop site and assist the president and other committee chairs with the identification of meeting locations, as requested.

**Activity:** The NAOW workshop will be held at Clemson University for 2009. A final contract should be available soon. The contract includes provisions for the actual workshop and the addition of the planning workshop to be held in March at Clemson. Hotel arrangements are in the planning stages once confirmation of attendees is finalized.

### Discussion

With the future of our conference numbers and budget being in question, the Site Selection chair would like to discuss the financial impact of our current contract responsibilities in regards to the 2009, 2010 and 2011 Annual conferences. Discussion pursuant to the Transitional Board meeting should also be included. A review of the 2011 contract with the Hyatt in Jacksonville may also be needed once we are done with 2009 conference.

**Recommendations:**

1. The Site Selection Committee will continue to solicit and secure sites for future NAOW workshops as well as the meeting site for the 2012 Annual Conference in AL, future board meetings, and conference committee meetings.

<b>Category</b>	<b>Hotel A</b>	<b>Hotel B</b>	<b>Hotel C</b>
<b>City/State</b>	<b>Biloxi, MS</b>	<b>Jackson, MS</b>	<b>Biloxi, MS</b>
<b>Hotel Name</b>	<b>Beau Rivage</b>	<b>Marriott Jackson</b>	<b>The Grand Casino</b>
Available Dates-usually the 1st weekend in Nov	Nov 6-8	Nov 6-8	Nov 6-8
Room Allotment Fri-28 rooms Sat-28 rooms	yes	yes	yes
Room Rate-we try to look between \$100-169 as most of our schools are state schools What are charges for Double, Triple or Quad?	\$159	\$109-119	\$129
Room Deposit Is there a deposit required?	no	no	no
Room Cancellation-we prefer 72 hrs prior	yes	ues	yes
Room Attrition-we normally look for 80%	non specified	75%	non specified
Meeting Space charge-what is charge based on?	\$500 per day, may be waived with food and beverage	\$300 per day	\$250 per day, may be waived with food and beverage
Food/Beverage Minimum? Avg range cost of b'fast, lunch and dinner	no minimum. B'fast \$19-26, lunches \$19-35, dinners \$42-80	\$200 minimum. No menus included.	no minimum. B'fast \$14.95-24.95, lunches \$15.95-28.95, dinners \$18.50-50.00
Coffee/Gallon	\$47 a gal	no menus included	\$32 a gal
Soda/Water	\$3/\$3	no menus included	\$2/\$2
<b>Special Considerations:</b>			
Presidential Suite-usually comp'd	none listed	none listed	none listed
Sample Flight costs-used President and 9 incoming State Presidents	\$2100 plus taxes and fees	\$3300 plus taxes and fees	\$2100 plus taxes and fes

**Diversity Report**  
**Debra Talley**

**Summary of Activities**

**LRP7.2/LRP7.3:** Policies and procedures are accurate and complete in order to provide consistent Associational direction.

**Activity:** The Diversity Committee members have drafted the recommended text for the policies and procedures that will govern the committee. The chair will submit the draft to the Executive Board at its February 2009 meeting.

**PP6.0:** Disseminate quality information to enhance communication among members in a timely and cost-efficient manner. Prepare and submit reports to the Secretary and make reports and submit action items at Board meeting.

**Activity:** The Diversity Chair submitted a Diversity Committee article on November 21, 2008 to the SASFAA Newsletter Chair to be included in the winter edition of the SASFAA Newsletter.

The second and third monthly state highlights were posted to the SASFAA list serve on December 2, 2008 and January 22, 2009 respectively. The second state to be highlighted was Florida and the third state was Kentucky.

The Diversity Chair submitted a copy of the February Board Report to the SASFAA Secretary on January 22, 2009.

**GAP06-07:** The professional growth and competencies of members are addressed by offering workshops, seminars, meetings and other training opportunities.

**Activity:** A Diversity Leadership session was presented at the SASFAA Leadership Symposium held at the Grove Park Inn in Asheville, North Carolina on December 8-10, 2008.

The Diversity Committee developed five (5) interest sessions on a wide range of topics that will be presented at the SASFAA annual conference at the Sheraton Convention Center Hotel in Myrtle Beach, South Carolina on February 8-11, 2009.

### **Discussion**

The Diversity Leadership session presented as a part of the SASFAA Leadership Symposium was very well received by leadership participants. David Gelinas, from Davidson College served as facilitator for the leadership panel. The panel included Cruzita Lucero (Northeast State Technical Community College), Wanda White (North Carolina Community College System) and Brent Tener (Vanderbilt University). The panelists shared their leadership challenges and experiences with the participants.

The Diversity Committee has developed five (5) interest sessions to be presented at the SASFAA annual conference. They are as follows:

1. **Veterans Success – They Have Done Their Job, Now We Must Do Ours** (presented by Jill Rayner, North Georgia College and State University).
2. **Making Your Financial Aid Office More Accessible to People with Disabilities** (presented by Liza Bruce, ECMC).
3. **The Role of Financial Aid in the Recruitment and Retention of First Generation Students, Non-Traditional Students and Veterans** (presented by Michael O’Grady, a Higher Education Consultant).
4. **Displaced and Dislocated Workers Challenges and Solutions** (presented by Deborah Byrd, Calhoun Community College and Dan Miller, Mississippi University for Women).
5. **Handling Stress and Dealing with Difficult Students** (presented by Sandra Rockett, Dyersburg State Community College).

Section 6 (Duties and Responsibilities of Committees and Liaisons) of the SASFAA Policy and Procedures Manual does not include any information about the Diversity Committee. In an effort to correct this oversight, the Diversity Committee has drafted the following text:

**The Diversity Committee explores ways to enhance the participation of all sectors and members in Association programs, activities, and services. To promote this objective, the Committee will:**

- a. **Provide recommendations to the Conference Committee for ways to promote diversity in annual conference programs;**
- b. **Provide recommendations to the Executive Board for ways to promote diversity in Association activities and services;**
- c. **Raise the awareness of SASFAA membership to the value of diversity and how the Association can benefit by developing training sessions on diversity-related topics for presentation at the annual conference;**
- d. **Continuously assess the needs of the membership in the area of diversity awareness.**

The Diversity Committee requests that the Executive Board review the recommended text and make any changes it deems necessary. After a review by the Executive Board and the addition of any changes/deletions to the text, the Diversity Committee will present the final recommended text to the Board at its next scheduled meeting and recommend the text be added to Section 6 of the P&P manual.

The committee continues its discussions of the feasibility of renaming the Diversity Committee. Several suggestions have been made, including “**Inclusion Committee**”, “**The Committee for Inclusion**” and “**Access and Diversity Committee**”. Suggestions for potential names for the committee were sought from SASFAA members via the list serve and newsletter; however, no suggestions have been received. The committee would like input from the Board on this issue.

Due to the Christmas holidays and other “job-related” obligations during the month of December, the Committee neglected to highlight the state of Georgia on the SASFAA list serve. However, the Georgia highlight will post to the list serve within the next several weeks.

### **Management Institute Report** **Brenda M. Brown**

#### **Summary of Activities**

**GAP 44:** The professional growth and competencies of members are addressed by offering workshops, seminars, meetings and other training opportunities.

The MI was held December 8-10, 2008 at the Grove Park Inn Resort & Spa in Asheville, NC.

**PP 5.34:** Consults with the Board and budget chair in developing future initiatives.

Complete financial analysis will be provided to Board and Budget Chair by year end.

**PP 6.0:** Disseminate quality information to enhance communications among members in a timely and cost-efficient manner.

- Various email communications were sent to the SASFAA members up until the actual event.
- Web site was continuously updated up until the actual event.
- Website was updated, making all presentations and resources accessible for download.

#### **Discussion**

Despite the budgetary constraints and climate we fulfilled our Grove Park Inn Resort & Spa contract. We had a total of 47 attendees plus 6 presenters. The Grove Park was very helpful in assisting SASFAA to ensure that we could meet our contract.

The MI online evaluation was available for one month and we had a total of 25 respondents (53% of attendees). Based on the responses from the attendees it was well received and our overall rating was a 4.56 out of 5. I have forwarded the evaluation result reports to the MI Committee members, President Boutell and Lisanne Masterson. Lisanne will utilize the results as part of the review by the Governance & Planning Committee in preparation of the 2008-09 GAP report.

The MI Committee will be also preparing a document by year end, to be included in Appendices of P & P to mirror the Summer Workshop Guide to assist in future MI event planning.

The MI Committee will also be reviewing the P & P regarding any guidance on comps for the Management Institute Committee Chair and its committee members and bring forth a proposal by year end for future events.

### **Alabama Report** **Charles Markle**

AASFAA sponsored the 2008 NASFAA Fall Decentralized Training on November 21<sup>st</sup> in Montgomery, AL. The training topic was “Aspects of Student Eligibility”, and the session was well attended. Thanks go to AASFAA Vice President, Phillip Nelson, and his co-presenters Kevin Ammons and Tommy Wilson.

The AASFAA Spring Conference Committee is scheduled to meet in the month of January in order to plan for our 2009 Spring Conference in Orange Beach, AL April 7-10. This could easily be AASFAA’s last trip to the beach for a while in light of the current economic climate. Governor Riley has indicated a hiring and travel freeze for state employees. AASFAA may be looking to the state parks as viable venues for our future conferences.

AASFAA looks forward to contributing to the SASFAA charity drive this February 2009 by donating for raffle a basket of products indigenous to the state.... chitterlings will not be included, but only because they are somewhat messy and could detract from the basket’s overall appeal.

Governor Riley has proclaimed the month of February as “Financial Aid Awareness Month” in the state of Alabama.

### **Florida Report** **Bill Healy**

FASFAA has moved away from two conferences per year (a Fall and a Spring Conference) to one annual conference which will be held on May 26<sup>th</sup> through May 29<sup>th</sup> this year at the Sawgrass Marriott in the greater Jacksonville area (Ponte Vedra Beach). The conference fee this year will be \$210.00. Our goal is to attract 375 attendees.

The Conference Committee under the direction of Nathan Basford has been very active and met on February 5<sup>th</sup> to finalize the program for the annual conference. While we are greatly disappointed by the fact that Greg Martin will not be allowed to attend and present at the conference, we are pleased that we were successful in our attempts to procure guarantors to present information relating to the Higher Education Opportunity Act-Reauthorization. Seven different guarantors have gladly agreed to provide reauthorization information at the beginning of the conference (which is where and when we were going to have Greg present). At this point in time the plans are that on the last day of the conference Yolanda Adams from the United States Department of Education will be presenting a General Session which will be a Federal Update. The communication we have received is that at some point in the future the Department will also be presenting focused information on Reauthorization through FSA conferences. Apart from doing FSA training at the conference (which is basically what we wanted when we spoke with Greg Martin in October and prior to planning to use guarantors rather than the Department when the Department indicated that they could not provide the training we had requested) we will make every reasonable effort to work in conjunction with the Department in the future on offering high quality FSA training within the state of Florida.

While we did not have a Fall Conference this year we did have Regional Workshops in regions three and five. Our thanks and appreciation is extended to Diane Reitz and to Travis Brown who coordinated these events. The association was also fortunate to have had an excellent Clock Hour Workshop which was coordinated by Tracy Misner. All of these events were well attended.

In December Trayce Smith (Rollins College), Ryan McNamara (Clearwater Christian College) and Diane Reitz (University of Central Florida) attended the SASFAA Leadership Symposium in Asheville, NC. As you know Brenda Brown, from the University Of Miami School Of Law chaired the Management Institute at the Grove Park Inn. Additionally, as we all know Bill Spiers is running for President Elect and Anh Do will be running for Vice President. Within SASFAA, FASFAA will continue to be well represented if that is the desire of SASFAA.

### **Georgia Report Pennie Strong**

GASFAA is planning its second half of the year. January 23, 2009 the Winter Executive Board Meeting was held in Macon. The Board cut the original budget set in June 2008 by 23%. The Board members are doing an excellent job providing services to the membership at nominal costs. Currently, only 27% of the budgeted expenses have been spent (spring conference will be the largest cost item). Currently 65% of the budgeted income has been realized.

In preparation of the new federal tax laws and documentation requirements regarding 990 filing, GASFAA's Board received a presentation by the CPA firm, CLHP, L.L.C., which has prepared the association's taxes for six years.

GASFAA has chosen to eliminate candidate speeches for this year's election. The following members are running for office for the 2009-2010 year:

President Elect:

Doug Tanner, Valdosta State University

Secretary:

Alicia Scott Atlanta Metropolitan College

Donna Smith, Lincoln College of Technology

Vice President for Programs:

Nancy Ferguson, University of Georgia

Lee Ann Kirkland Armstrong Atlantic University

Vice President for Professional Development:

Cathy Crawley, Georgia College & State University

Phillip Hawkins, Kennesaw State University

President Elect Jill Rayner will be attending the SASFAA President Elect Workshop February 8, 2009 and the NASFAA Leadership Workshop in Washington DC on March 8-10, 2009 and has several appointments with GA congressmen.

Michael Gantt, Sandra Griffin, and Thomas Harris attended the SASFAA Leadership Symposium December 8-10, 2008 and are considering a presentation at the Spring Conference based on the material.

Georgia public colleges and universities are experiencing a 9% budget cut and at this time a 9.5% cut has been stated for next year. Therefore, some reduction in attendance at the Spring Conference is being considered

GASFAA is conducting a general income fund raiser by selling T Shirts this Spring. The slogan or design of the t-shirt is a contest for members. The winner will receive a free Spring Conference registration.

Early preparations for the Spring Conference include offering Federal and State Updates with over 30 concurrent sessions based on survey requests. The Community Action Committee is planning for GASFAA's Annual Silent Auction to raise funds for the GASFAA Memorial Scholarship. Each year two \$500 scholarships are awarded through a drawing to two schools present at the Spring Conference.

Two Preconference Professional Development sessions are being considered regarding the new federal dependence questions and professional judgments. The Membership and Diversity Committees are planning an activity to foster communication between new members and first time attendees with the not so new members and to highlight the diverse sectors of our association. Also an activity will be conducted that brings the new members and first time attendees together with current committee volunteers, in hopes to encourage new members to volunteer for the upcoming year.

GASFAA is collaborating with the state agency, Georgia Student Finance Commission, on several projects. January 26, 2009, is Capital Day and a program entitled College, Yes You Can will involve over 100 high school students and counselors from around the state coming to the Capital building. Students will be able to apply for college and financial aid. State legislatures and Atlanta news has been invited. Several speakers are on the agenda, including GASFAA President, Pennie Strong. Additionally, 32 GASFAA members volunteered for new committees with GSFC. One committee is examining the entire program review progress and conducted its first meeting on January 24, 2009. The Leadership Academy Committee meets for the first time on January 29, 2009. GASFAA is excited and appreciative that the state agency and Tim Connell, GSFC President is collaborating with us and the open communication is great.

### **Kentucky Report** **Jennifer (Cosens) Priest**

#### **Spring Conference Planning**

KASFAA's Program Committee met in Erlanger, Kentucky on December 11, 2008 to begin planning for the spring 2009 conference. The planned theme is *KASFAA—Go for the Gold*, a continuation of the year-long Olympic Games theme. Chairs for the spring conference are Judy Bradley of Pikeville College and Gina Kuzuoka of Spalding University. The conference will be held April 15-17 at the Holiday Inn Cincinnati Airport in Erlanger, Kentucky.

#### **Executive Board Meeting**

KASFAA's executive board met on December 12, 2008 at the Holiday Inn Cincinnati Airport. Action items included approval of the spring 2009 conference tentative agenda, selection of KASFAA award recipients and approval of the slate of candidates for the 2009 election.

#### **Election 2009**

The Nominations Committee has worked hard to put together an impressive slate of candidates for KASFAA's 2009 election, which is being held January 26 through February 6 this year. The candidate for President-elect is Dave Cecil, Transylvania University; candidates for Vice President for Training are Rhyann Conyers, Georgetown College and Aaron Gabehart, Campbellsville University; the candidate for Treasurer is Andrea Spry, Transylvania University, candidates for Two-year Public School Representative are Chuck Anderson, Hazard Community College and Michael Barlow, Elizabethtown Community & Technical College, and candidate for Proprietary School Representative are Charlene Geiser, Sullivan University System and Patricia Nettleton, Beckfield College. KASFAA's election will once again be held online.

#### **Financial Aid Call-in Show**

KASFAA's annual financial aid call-in show aired Thursday, January 22 on Kentucky Educational Television (KET). The on-air panelists were Becky Gilpatrick, KHEAA; Runan Pendergrast, Bluegrass Community and Technical College, Shelley Park, Eastern Kentucky University, and Rhyann Conyers, Georgetown College. While the show aired, 15 KASFAA volunteers answered telephones and routed questions to the on-air panel.

#### **College Goal Sunday**

College Goal Sunday was held on Sunday, January 25 at 21 sites in 18 Kentucky communities. It is still too early to determine the number of families served by this important statewide event, but from early reports the day was once again very successful. Approximately 165 KASFAA members volunteered to give up their Sunday afternoon to help families navigate the FAFSA and financial aid process.

#### **Support Staff Workshop**

KASFAA's annual one-day support staff workshop will be held on March 25, 2009 at KHEAA's office in Frankfort. Planned topics are EFC hand calculations, a diversity session, retirement planning and a brief Federal update. This workshop is a great opportunity for individuals who normally do not get the opportunity to attend this type of training to get out of the office and gain some specific financial aid knowledge. There is no charge for the workshop, and any financial aid office employee of a member school is welcome to attend, regardless of whether or not the individual is a KASFAA member. This year's Support Staff Workshop committee is chaired by Sabrina Holder of Gateway Community and Technical College.

As a whole, 2008-2009 seems to be progressing very well. Budgeting and spending has been very conservative this year, and all of KASFAA's committee chairs are to be commended for what they have been able to accomplish on a very limited budget. Attendance at KASFAA events has been comparable to that of years past, and KASFAA members remain eager to help with training and outreach activities.



## **Mississippi Report** **Marilyn D. James**

MASFAA's second board meeting was held on Monday, October 27, 2008 at 1pm and MSU-Meridian Campus. This was one day prior to our fall training event.

Mary Jane Covington, High School Relations Committee Chair and committee members were able to plan the following National Training For Counselor and Mentors workshops across the state of Mississippi. Approximate numbers for attendees are listed,

1. Jackson, MS – 60 attendees – November 14, 2008
2. Columbus, MS – 30 attendees – November 18, 2008
3. Oxford, MS – 20 attendees – November 20, 2008
4. Cleveland, MS – 15 attendees – November 21, 2008
5. Long Beach, MS – 25 attendees – December 3, 2008

MASFAA represented at the SASFAA's Leadership Symposium with Mr. Seph Anderson- University of Mississippi, Ms. Donna O'Quinn-Pearl River Community College, and Ms. Trina Wilson-Meridian Community College. All reported that this was one of the best if not the best leadership training experience that they encounter and was thrilled that they got an opportunity to attend. They also wanted me to pass along their appreciation of the hard work that Mrs. Sharon Oliver and the other SASFAA training committee members put into making this a wonderful and professional event. One participant said that the experience was not only professionally changing but personally it was life changing to them.

MASFAA board members, Ms. Donna O'Quinn-Vice President and Ms. Tracy Keith-Treasurer will be attending NASFAA Leadership Conference in March in Washington, D.C. All other current voting board members have already attended this conference/training.

We have not set our new aid training dates at this point. Ms. Donna O'Quinn is working out the details and proposal for our FA 101 2009 class. We did make the decision not to make contract with the location that we have had for the past several years due to cost constraints and lack of sponsorship.

MASFAA's Spring/Summer Annual Conference will be June 10 – 12, 2009 and Ms. Julie Tompkins of Bancorpsouth Bank is conference chair. The conference will be in Tunica, MS at the Grand Casino and Convention Center. Our registration fee is set for \$125.00 per MASFAA member and the room rate is \$69.00 per night. The conference committee is already working hard to make it another success. We will have challenges as it relates to budgets and sponsorship but I think that we will be OK.

## **North Carolina Report** **Amy Berrier**

### **Summary:**

NCASFAA held our third board meeting on Sunday, November 2, 2008 at the Embassy Suites Hotel in Winston-Salem, NC. We voted to sign an additional contract for fall 2010 at the Embassy Suites at Concord Mills. This contract has a one-year cancellation clause. Considering the current state of the economy, our revenue task force and the current and incoming executive boards may revisit this situation.

A letter was sent out signed by myself and President-Elect Lisa Koretoff to all NC Chancellors and Presidents urging them to consider funding for financial aid administrators to attend SASFAA and NCASFAA. We stressed the importance of the changes brought forth by HEOA not only to the FAO but to the entire campus. We have heard some feedback that this has helped. However, the Governor has issued a non-essential travel freeze which could seriously impact attendance at our spring conference. However, each institutions administration is interpreting this differently as to what they deem "essential". We plan on doing a poll and some more research later when more information comes out to see if there is a way we can determine numbers for the spring.

Immediate Past-President Tony Carter and the Nominations and Elections Committee has secured a slate to fill the positions of President-Elect, Vice-President, Secretary, Treasurer-Elect, Four-Year Public Representative, Independent Representative, and Agencies Representative.

Liza Bruce and Michael O'Grady have been charged with developing an outstanding program for the NCASFAA Diversity Pre-Conference Workshop for spring 2009. As we all have experienced on our campuses and in our offices, the demographic make-up of our students, families, and co-workers is constantly changing. The nation was devastated on September 11, 2001 and things have not been the same since. The Diversity Committee is working to provide us with the tools and knowledge to face these changes. The committee is also working with the Executive Board to ensure that all committees are focused on the changes that our profession faces daily.

### **Completed Tasks:**

- NCASFAA Conference Committee Conference Call, December 18, 2008

**Events Calendar:**

February 7, 2009 – SASFAA Executive Board Meeting, Myrtle Beach, SC

February 8, 2009 – SASFAA Presidents-Elect Workshop

February 8-11, 2009 – SASFAA Annual Conference 2009, Myrtle Beach, SC

February 27, 2009 – NCASFAA Executive Board Meeting, Meredith College, Raleigh, NC

April 19, 2009 – NCASFAA Executive Board Meeting, Hilton Wilmington Riverside, NC

April 20-22, 2009 – NCASFAA Spring 2009 Conference, Wilmington, NC

**South Carolina Report****Jeff Dennis**

SCASFAA conducted its NASFAA Decentralized training on December 9<sup>th</sup>. We had 28 in attendance for this training. We are grateful to Meg Hurt from Coastal Carolina University for successfully chairing the Professional Development committee. Meg, Danielle Rymer from USC-Columbia, and Wendy Watts from Coastal Carolina served as instructors. All of the ladies did an excellent job and kept us anticipating the next section of material to be covered.

Vendor support this year was as expected. I projected in June that our support would be \$30,000 and as of today we have \$29,500.00 in support. Our total vendor support in 2007-2008 was \$56,295. I am confident our vendors who cannot support us this year will be back when economic conditions improve.

Membership for our association is down some from the previous year, which is not unexpected. SCASFAA boasted 466 members in January 2008, but by January 2009, we dwindled to 370 members. This is a decrease of 96 members.

At our Fall Conference, we bestowed lifetime membership to Donna Hawkins from Wofford College. Donna retired this past summer and had been active in SCASFAA serving as its president in 1988-1989. We also recognized three others besides Donna who retired this fall. Those were Paula Edwards from USC-Columbia, Tom Fulbright from Greenville Technical College, and Pearl Givens from the Medical University of South Carolina.

I would like to highlight our Consumer Relations Committee and its chair Violette Hunter from USC-Columbia TRIO. The committee is working diligently to bring up College Goal Sunday on February 28<sup>th</sup> in South Carolina. We currently have 12 locations planning to host this event.

Our Nominations and Elections committee chaired by Tabatha McAllister from USC-Regional Campuses is providing SCASFAA with a full slate of candidates. I would like to have printed their names here but as of the submission date of this report the executive board has not approved the slate. A full slate looks promising for the future.

I would like to express my appreciation to Nancy Garmroth and Earl Mayo for serving as Local Arrangements chairs for the SASFAA conference being held here in Myrtle Beach. They have also had a host of SCASFAA members who have volunteered their time to make sure that all attendees enjoy the conference.

A listing of the full committee of the 08/09 SCASFAA Board can be found at [www.scasfaa.org](http://www.scasfaa.org).

**Tennessee Report****Jeff Gerkin**

As reported at the last Board meeting, the TASFAA 2008 Fall Conference was a great success. Although a decline in attendance was noted, due to a conflicting Banner meeting on the same dates, it appears that conference expenses will come in under budget despite not fulfilling the conference hotel room block commitment. Negotiations with the conference hotel to reduce food and room block commitments for the spring conference in April proved successful.

Preparations are well underway for the Spring 2009 TASFAA Conference being held at the Nashville Airport Marriott in Nashville, TN, April 5-8, 2009, under the coordination of Lester McKenzie, Spring Conference Chair. The conference theme is "Excellence...is rare, praiseworthy and noble". Several of the general session speakers already scheduled to present include, Tim Webb - TN Commissioner of Education, Dr. Phillip Day - NASFAA President, and Brett Leif - NCHELP President. TASFAA also looks forward to hosting Heather Boutell - SASFAA President, at the spring conference.

The 2009-10 TASFAA election process will be completed as of the presentation of this report. Candidates were nominated and selected as mandated by the amended TASFAA By-laws approved at the last TASFAA Business Meeting in October.

NASFAA Decentralized Training Workshops were held in November 2008 at three locations across the state. The workshops hosted 141 attendees and provided workshop materials and training at no cost. Rick Taphorn, TASFAA Training Committee Chair served as the presenter at each workshop.



Through the coordinated efforts of two TASFAA Committees, Financial Aid Awareness and Governmental Relations, a proclamation from Tennessee Governor, Phil Bredesen, designated February 2009 as “Financial Aid Awareness Month” in the State of Tennessee.

Marian Huffman, TASFAA President-Elect will attend the NASFAA Leadership Conference in March 2009.

### **Virginia Report Brenda Burke**

The winter months have been a busy time for VASFAA. While we do not have a conference until Spring, we have been busy providing training opportunities to our membership.

**Secondary Schools:** VASFAA ended up having 13 sites hosting Guidance Counselor Workshops throughout the state during the months of November and December. 61% of the evaluations have been received to date: 308 participants attended these workshops with very positive responses to the information they received. 88% of the reporting sites indicated they would host the workshop again next year.

**Non-Conference Training:** The committee had their second webinar on December 1, “Common Program Review Findings.” This is the second webinar in a year long series under the theme “Self-Assessment for Optimum Compliance.” There are webinars planned for each month in the Spring. January is “Who’s Job is it Anyway” by Pam Rambo, Consultant; February is “Proactively Addressing Compliance Weakness” by Kachie Vaughan, USA Funds; March is “Doing Your own Internal Program Review: Ready, Set, Audit!” by Nancy Wilson, TG; and April is “Becoming a Compliance Powerhouse” by an expert panel of Financial Aid Professionals. The numbers in attendance continue to increase with each webinar that has been hosted to date.

The committee held the first of two New Aid Officer’s Workshops on December 8<sup>th</sup> in Richmond, Virginia. The second workshop will be held in April, the day before the annual conference in Roanoke, Virginia. The locations were chosen to have workshops on both sides of the state.

**Awareness:** On January 31, the Awareness committee hosted 22 Super Saturday sites around Virginia. A multi-media blitz was conducted to make the event a success. A movie ad was run in theaters during the month of January in three area movie theaters. Billboard ads were placed in 2 counties in Virginia. In coordination with the **Public Relations** committee, event announcements were sent to radio and television media around the state. The media blitz was made possible with funding from the College Access Grant that was awarded for use to promote the Super Saturday event. Current figures from Super Saturday are that 2,106 students were assisted with 4 sites not reporting yet.

Other events that have been happening within VASFAA include:

**Conference:** Plans are well under way for the Annual conference April 26-29, 2009 at the Hotel Roanoke and Conference Center. They have been pro-actively working with the hotel to release space that we will not be using. They have been collaborating with the Conference Training Committee to make sure space is utilized to its maximum efficiency.

This year the conference is offering a registration options. The first option is the one everyone is familiar with. The second is called Conference Registration FlexFee. Under this option up to 4 people from one institution can attend the conference on different days under one conference registration fee.

**Conference Training:** The committee is busy working to secure sessions for the conference. The committee has secured speakers with a state, regional, and national perspectives related to financial aid. Greg Martin is confirmed as our presenter for the Federal Updates.

**Developmental:** The committee has been steadfast in securing donations for VASFAA. They are currently within \$2500 of reaching their revenue projections of \$22,500 for the year. There is a possibility we will exceed this figure before the conference in April. The vendor sponsorship fee for the 2008-2009 year is \$1500. This fee supports all of the VASFAA training functions for the year and is not solely attached to the annual conference.

VASFAA was able to send three individuals to the SASFAA Leadership Symposium in Asheville, NC. The three people that attended, Vera Riddick, Keisha Pope, and Heather Hollandsworth came back with nothing but praise for the instructors and instruction they received while at the Symposium. Kudos to the members of the Leadership Symposium committee for a job well done!

### **Budget & Finance Committee Report Chris Tolson**

#### **Summary of Activities**

**GAP54, LPR 13.2 & PP 6.39:** Review and update, as necessary, the operating procedures for the SASFAA Endowment Fund. Review the SASFAA Guide to Financial Management annually to ensure the continuity of sound financial practices. Make recommendations annually for changes to the approved SASFAA Guide for Financial Management (February 1997) as amended (see Appendix B).

**Activity:** To date, I have received recommendations from two of the state president's recommending individuals to serve on the Endowment Committee.

**LPR 14.3:** Monitor, review and revise, as necessary, the Association's investment strategy for positioning the Association's finances.

**Activity:** A copy of the current standing of the Association's investments is attached.

**PP 6.30:** Review, from a fiscal liability perspective, all contract proposals and makes recommendations to the president.

**Activity:** A copy of the Association's current contractual agreements is attached. (Contract Commitments 2008-2011).

**P&P 6.32:** Conduct with the treasurer quarterly reviews of cash balances and expenses and make appropriate recommendations.

**Activity:** Treasurer, Terri Parchment sends copies of the monthly checking account reconciliations. Balances are accurate.

**P&P 6.33:** Perform a checkbook audit at the annual conference and makes report at the transitional meeting.

**Activity:** The budget and finance committee will perform daily balance checks at the conference and report at the transition meeting in June.

**P&P 6.37:** Prepare in collaboration with the president and the treasurer, the fiscal budget prior to the July/August board meeting.

**Discussion:**

It is recommend President-Elect, Keith Reeves and the elected Treasurer work with the 2009-10 board and committee chairs prior to the transition meeting to formulate a proposed budget to present at the transition meeting.

**SASFAA, Inc.  
Hotel Contracts  
1/22/2009**

**Sheraton Myrtle Beach Convention Center- Myrtle Beach, SC - February 2009 - Annual Conf.  
February 5-11, 2009**

1,720 room nights plus 10% tax - room rate is \$115

Addendum signed 10/31/07 decreases room nights from 1760 to 1720

**Deposit of \$2,000 due 60 days prior to event (12/5/2008)**

Catering minimum is \$80,000 - SASFAA owes difference in actual vs. minimum

Room/Services not used

10% or less - SASFAA pays -0-

10% to 30% - SASFAA pays 40% of lost revenue

30% to 60% - SASFAA pays 60% of lost revenue

Over 60% - SASFAA pays 100% of lost revenue

**Cancellation provisions**

Greater than 360 days - \$44,400 (15% of TAR) - TAR is total anticipated revenue

**Between 360 and 60 days - \$74,000 (25% of TAR)**

60 and 46 - \$148,000 (50% of TAR)

45 and 31 - \$222,000 (75% of TAR)

30 and 2/5/2009 - \$296,000

**\$296,000**

**Don CeSar - St. Pete Beach, FL - June 2009-June 2011 - Board Meeting  
June 4-7, 2009; June 3-6, 2010 and June 2-5, 2011**

Have to meet 90% of guest room commitment - SASFAA must pay unused portion

Tax is 11% and resort fee is \$10 per person, per day)

90% of 50 guest room commitment - 45 rooms

90% of 45 guest room commitment - 41 rooms

SASF AA can reduce guest room commitment by 10% 30 days prior to arrival date  
 \$1,800 minimum food and beverage commitment - SASFAA owes difference in actual vs minimum  
 145(50 on Thursday and Friday and 45 on Saturday) room nights (@\$220.89 - \$199 plus \$21.89) = \$32,029

**Non-Refundable Deposits of \$2,000 due by December 31, 2008, December 31, 2009  
 and December 31, 2010**

Cancellation provisions

**11/21/06 - 181 days - 25% of anticipated revenue = \$8,007 plus \$1,800**

**180 days - 91 days - 50% of anticipated revenue = \$16,015 + \$1,800 \$17,815**

90 days - 31 days - 75% of anticipated revenue = \$24,022 + \$1,800

Within 30 days = \$32,029 + \$1,800

**Marriott - Louisville, KY - February 2010 - Annual Conference  
 February 18-25, 2010**

\$80,000 food and beverage minimum commitment - SASFAA pays difference in minimum and actual

1,640 room night commitment @\$149 - 80% must be used - tax is 15.01%

Cancellation provisions

3/31/07 - 2 years prior - \$66,190

**2 years - 1 year - \$132,380**

**1 year - 6 months - \$198,570 \$198,570**

Less than 6 months - \$264,760

**Hyatt - Louisville, KY - February 2010 - Annual Conference Additional Rooms  
 February 19-24, 2010**

670 room nights \$149 - 80% must be used - tax is 15.01%

Cancellation provisions

3/30/07 - 730 days - \$39,932 (40% of rooms)

**729 days -365 days - \$49,915 (50% of rooms) \$49,915**

364 days - 180 days - \$69,881 (70% of rooms)

170 days or less - \$79,864 (80% of rooms)

**Hyatt Regency - Jacksonville, FL - Annual Conference - February, 2011**

1865/ minimum 1492 room nights - room rate is \$159 plus 13% tax (80% plus tax of unused)

Rooms - 80% of gorup rate unused

Room Rebate of \$5 per room used/paid - rebate paid to SASFAA no later than 30 days after master acct is pd

Catering Minimum \$90,000 - SASFAA owes difference in minimum vs actual used

Cancellation:

**0 - 729 days -\$118,614 (40% of room revenue) \$118,614**

729 - 365 days - \$148,267.50 (50% of room revenue)

364- 180 days - \$207,554.50 (70% of room revenue)

179 or less - \$269,228.00 (80% of room reveue, 40% of catering & rental revenue)

Deposit - 30% of estimated food/beverage, audio visual - due 30 day prior - 1/10/2011 (estimate \$27,000)

**Total liability as of January 19, 2009 Liability changes based on individual contracts and timing. \$680,914**

**SASF AA, Inc. Investments 1/22/2009**

Holding Company	Account #	Contact Information	Purchase Date	Amount	Interest Accrual	Term	Maturity Date	Rate	Interest Payment Schedule	Current Estimated Value
Business First Bank	DFL006262	SunTrust Investment Group	6/6/2007	\$70,000	n/a	24	6/22/2009	5.20%	Paid Monthly to Checking Account	\$70,000
Hibernia National Bank	DFL006262	SunTrust Investment Group	6/18/2004	\$75,000	n/a	60	6/30/2009	4.35%	Paid Semi-Annual to Checking Account	\$75,000
Flagstar Bank*	DFL006262	SunTrust Investment Group	7/18/2007	\$50,000	n/a	24	7/24/2009	5.25%	Paid Semi-Annual to Checking Account	\$50,000

Security Bank	DFL006262	SunTrust Investment Group	1/24/2008	\$50,000	n/a	18	10/23/2009	4.35%	Paid Monthly to Checking Account	\$50,000
Southern Community Bank, GA	DFL006262	SunTrust Investment Group	7/30/2008	\$50,000	n/a	18	1/29/2010	4.10%	Paid Monthly to Checking Account	\$50,000
Bank FLA Ft Lauderdale	DFL006262	SunTrust Investment Group	7/23/2008	\$25,000	n/a	24	7/23/2010	4.20%	Paid Monthly to Checking Account	\$25,000
Irwin UN Bk & Tr Co	DFL006262	SunTrust Investment Group	9/29/2008	\$50,000	n/a	24	9/29/2010	4.15%	Paid Semi-Annual to Checking Account	\$50,000
<b>Haven Tr. Bank* St. Augustine FLA</b>	DFL006262	SunTrust Investment Group	12/7/2007	\$65,000	n/a	36	12/7/2010	4.50%	Paid Monthly to Checking Account	\$65,000
River Cities Bank	DFL006262	SunTrust Investment Group	4/24/2008	\$25,000	n/a	36	5/2/2011	3.85%	Paid Monthly to Checking Account	\$25,000
Evergreen State Bank	DFL006262	SunTrust Investment Group	6/11/2008	\$50,000	n/a	36	6/20/2011	4.10%	Paid Monthly to Checking Account	\$50,000
Suntrust Bk Atlanta	DFL006262	SunTrust Investment Group	9/29/2008	\$45,000	n/a	36	9/29/2011	6.6% **	Paid Monthly to Checking Account	\$45,000
<b>Total CD's</b>				\$555,000						\$555,000
<b>Money Market - Ridgeworth</b>				\$46,807						
<b>TOTAL INVESTMENTS</b>				\$601,807						
* denotes Endowment Fund										

### Newsletter Editor Report Deborah H. Clark

#### Summary of Activities

**PP6.0:** Review and respond to all articles submitted for the newsletter.

**Activity:** The Newsletter Chair reviewed each article submitted for required format and appropriate text and acknowledged receipt of each article.

**PP6.0:** Prepare and submit reports by the deadline dates established by the secretary.

**Activity:** The Newsletter Chair submitted a board report for February to the Secretary by the due date.

#### Newsletter Deadline

The winter edition of the newsletter, which was scheduled for December, was released on December 16, 2008. The next issue is scheduled to be published in April. All submissions should be submitted to the Newsletter Editor, Deborah H. Clark, at [dclark@atlantatech.edu](mailto:dclark@atlantatech.edu). Materials should be sent as a word attachment, times new roman font, 10 pitch, and third person.

The remaining issues and deadline dates are as follows:

Edition  
Spring  
Summer

Publication Date  
April  
June

Article Due Date  
March 10, 2009  
May 10, 2009

**LRP10.2:** Improve frequency and quality of communication with members.

**LRP10.2:** Submit a point of interest/reference an article from the current newsletter to the membership to 'wet the appetite' of the membership.

**Activity:** The Newsletter Chair referenced articles and a new feature from the winter newsletter in a communication sent to the membership to increase and maintain interest in the newsletter.

**PP6.122:** Request State Newsletter Editors to review and recommend articles from their state newsletters.

**Activity:** The Newsletter Chair sent communication to each state representative to solicit articles from each state that would be of interest to the entire regional membership.

**Activity:** The Newsletter Chair sent communication to each state representative to solicit assistance with a new feature “Spotlight on State Presidents”. Each state representative was asked to “interview” their respective state president, which will allow the SASFAA membership to get to know the state presidents.

**PP6.125:** Forward the finished version of the newsletter to the SASFAA Webmaster for posting to the SASFAA Web site.

**Activity:** The Newsletter Chair communicated with the ATAC representative to ensure posting of the newsletter to the website.

### **Legislative Relations Report** **Bill Spiers**

#### **Summary of Activities**

**Gap 32, 35 PP 6.82** The Legislative Affairs Committee has posted two articles to the SASFAA Legislative Affairs Committee Website. The first is on Negotiated Rule Making. This article was written by Karen Fooks who has participated in Negotiated Rulemaking several times through the years. The second article was written by Kim Jenerrette and Shelley Park on TEACH. The committee is in the process of reviewing the changes that were posted at the end of Christmas break in the Dear Partner letter from USDOE.

**LRP 11.2** Two new articles were posted to the SASFAA website and sent to the membership. The first article was on TEACH and the second on Negotiated Rule Making. Additional articles will be posted and forwarded as the Dear Partner letter is analyzed by the committee.

Since our last meeting the Legislative Affairs Committee has had one conference call. There will be an attempt for the committee to meet while we are at SASFAA. Because of the early writing of this report, I cannot say when we are going to meet

The Legislative Affairs Committee is monitoring changes in Washington and will provide updates on changes that will impact the financial aid community.

### **Electronic Services Report** **Joe Dobrota**

#### **Summary of Activities:**

**GAP22:** The SASFAA Policy and Procedures Manual shall be continually updated as appropriate and updates posted to the SASFAA Web site upon approval by the Board.

*Posted updated P&P with edits made after November Board meeting. (See discussion item below regarding wording of this GAP item)*

**GAP24:** It is recommended that the Board explore other options that will allow Board members to update information on the Web site rather than waiting on ATAC to do the postings. It sometimes takes ATAC a while to get items posted and/or updated.

*Communicated with ATAC regarding the possibility of allowing updates by Electronic Services Chair via a product such as Contribute.*

**GAP30:** Continue to review emerging technologies and incorporate those which could provide significant benefits to SASFAA members and result in cost-savings to the Association.

*I was contacted by a conference registration service seeking to have SASFAA utilize their services. I spoke with them regarding their product and pricing. It did allow for our control in editing the pages, allowing for faster updates when needed, however the cost per registrant and initial setup was prohibitive.*

**GAP49:** Recommend that quarterly budget statements continue to be posted on the SASFAA Web site.

*Posted the November budget statement.*

#### **Other Activities:**

Updated various parts of the website:

- Management Institute post-conference information
- Various edits to conference chair photos
- Updated banner ads to reflect current levels of sponsorship
- On-going development of the Conference Website

**Discussion:**

**GAP22** states: The SASFAA Policy and Procedures Manual shall be continually updated as appropriate and updates posted to the SASFAA Web site upon approval by the Board

*The wording almost makes it sound like the posting needs approval of the Board. Does the posting of the P&P to the website actually need to be approved by the Board or does this sentence mean update once updates are approved by the Board?*

P&P Page 163-165 outlines the operation calendar for “Communication (Electronic Services)”.

*Does the P&P need to be updated to exclude “Communication” and only list as “Electronic Services”?*

P&P Operational Calendar for Electronic Services mentions:

Obtain updated membership database from the membership chair and post to the website

*Need clarification on whether this should remain on operational calendar now that we have an online database?*

**Agency Report  
Tracy Ireland**

**Lender Liaison Report  
Chuck Sanders**

The student lending community is certainly happy to see 2008 come to an end while hopeful that the waters will be calmer in 2009. The credit and financial markets have not improved over the past few months which has made it virtually impossible for lenders to finance student loans in the traditional markets.

Fortunately, the various programs created utilizing ECASLA have enabled students and families to obtain the federal student loans needed to meet their educational expenses for Academic Year 2008-09 and have been extended to also ensure funding for Academic Year 2009-10. The U.S. Department of Education approved a new funding program the week of January 19 which provides funding for loans dating back to 2003. This is important to many in the student loan industry that have expiring lines of credit.

Congress is debating an \$825 billion stimulus package proposed by President Obama which contains several higher education financial aid measures such as increasing the maximum Pell Grant from \$4,850 to \$5,350, \$490 million for Work-Study and increases annual loan limits on unsubsidized Stafford Loans by an additional \$2,000. The Democratic leaders have established a self-imposed deadline of mid-February to finalize the bill.

All of the trade association groups are working on proposals to revamp federal education loans that will simplify the process for both students and schools while having structural features that will allow the loans to be financeable in the credit markets.

**SASFAA Special Project(s) Report  
Joanie Walker**

## ATTACHMENT B MEMBERSHIP SURVEY

### SASFAA Membership Survey 2008-2009

*The world of financial aid is changing rapidly. How can SASFAA best support you in this volatile environment? More than ever, we need your input in order to plan for the future!*

*This survey is being sent to past and present members of SASFAA. We need to hear from ALL of you. Please help us determine the most effective programs and services we can offer, and what membership benefits would be most valuable to you.*

#### ABOUT YOU

**Which of the following best describes the organization you work for? \***

<input type="radio"/> Public 2-Year College	<input type="radio"/> Public 4-Year College
<input type="radio"/> Private 2-Year College	<input type="radio"/> Private 4-Year College
<input type="radio"/> Graduate or Professional School	<input type="radio"/> Career School
<input type="radio"/> Student Loan Lender	<input type="radio"/> Student Loan Servicer
<input type="radio"/> Guarantor	<input type="radio"/> Consulting Group
<input type="radio"/> Government Agency	<input type="radio"/> Financial Aid Software Company
<input type="radio"/> Other (non-profits, foundations, etc.)	

**How many years have you been in financial aid?\***

<input type="radio"/> 0 - 1 year	<input type="radio"/> 2 - 5 years
<input type="radio"/> 6 - 10 years	<input type="radio"/> 11 -15 years
<input type="radio"/> 16 - 20 years	<input type="radio"/> 21+ years

**How many years have you been in SASFAA? \***

<input type="radio"/> 0 - 1 year	<input type="radio"/> 2 - 5 years
<input type="radio"/> 6 - 10 years	<input type="radio"/> 11 -15 years
<input type="radio"/> 16 - 20 years	<input type="radio"/> 21+ years

**Are you serving SASFAA in any of the following capacities for 2008-09? Please check all that apply. \***

<input type="checkbox"/> Session moderator	<input type="checkbox"/> Session presenter
<input type="checkbox"/> Event sponsor	<input type="checkbox"/> Committee member
<input type="checkbox"/> Committee chair	<input type="checkbox"/> State Association President on the SASFAA Board
<input type="checkbox"/> Elected SASFAA Officer	<input type="checkbox"/> Not Applicable

**Have you served SASFAA in any of the following capacities in years past? Please check all that apply. \***

<input type="checkbox"/> Session moderator	<input type="checkbox"/> Session presenter
--	--

<input type="checkbox"/> Event sponsor	<input type="checkbox"/> Committee member
<input type="checkbox"/> Committee chair	<input type="checkbox"/> State Association President on the SASFAA Board
<input type="checkbox"/> Elected SASFAA Officer	<input type="checkbox"/> Not Applicable

**Are you currently a paid member (or Honorary Member) of SASFAA for 2008-09? \***

<input type="radio"/> Yes	<input type="radio"/> Not yet, but I intend to join	<input type="radio"/> No, I will not be a member this year
---------------------------	---	--

If you will not be a member, please let us know why you will not be joining SASFAA this year. **We truly need your honest feedback. Check all reasons that apply and elaborate below. \***

<input type="checkbox"/> I no longer work as a financial aid professional.	<input type="checkbox"/> Although I am in financial aid, I no longer work in the SASFAA geographical area.
<input type="checkbox"/> I am not going to be attending the conference this February.	<input type="checkbox"/> My organization will not fund me to participate in SASFAA activities.

<input type="checkbox"/> I am not interested in SASFAA. Explain: <input type="text"/>
---

<input type="checkbox"/> Other:
---------------------------------

Please add any additional comments here, related to the reason above

**Do you believe that SASFAA membership has value even if you do not attend the conference? \***

<input type="radio"/> Yes	<input type="radio"/> No
---------------------------	--------------------------

Why or why not?

**ABOUT SASFAA PROGRAMS**

**Which of the following SASFAA programs will you attend during 2008-09?**

<input type="checkbox"/> SASFAA Leadership Symposium	<input type="checkbox"/> SASFAA Management Institute
<input type="checkbox"/> SASFAA Annual Conference	<input type="checkbox"/> SASFAA New Aid Officers Workshop

**Please rate the quality of the programs listed below that you have attended previously.**





	Excellent	Above	Average	Below	Poor	Never
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		Average		Average		Attended
SASFAA Leadership Symposium						
SASFAA Management Institute						
SASFAA Annual Conference						
SASFAA Mid-Level Managers Institute						
SASFAA New Aid Officers Workshop						

## ABOUT SASFAA FEES

**The current conference fee is \$225. Is this fee:**

	Too high		About right
	Low – but please leave it as is		Low - it would be OK to raise it in the future if needed

**The current membership fee is \$25, and this amount has not been changed in many years. Is this fee:**

<input type="radio"/>	Too high	<input type="radio"/>	About right
<input type="radio"/>	Low – but please leave it as is	<input type="radio"/>	Low - it would be OK to raise it in the future if needed

**If the membership fee is raised in the next year or so (a decision that would need to be voted on by the membership), what would be the maximum amount you would recommend?**

\_\_\_\_\_

## Who pays for your membership fee?

<input type="radio"/>	I pay personally to join SASFAA	<input type="radio"/>	My organization pays for the SASFAA membership (or reimburses me)
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**As SASFAA strives for financial stability in the future, what is your general opinion of fees being raised?**

	Fees should not be raised since many organizations have cut budgets, including travel to attend professional activities		Fees should not be raised because SASFAA can tap its reserves to support itself right now
	Fees can be raised if needed since vendor support is declining		Fees can be raised since they are already low
	Other:		
	<div></div>		

Do you have suggestions for how SASFAA can increase revenue? Please explain.

Do you have suggestions for how SASFAA can decrease expenses? Please explain.

SASFAA membership has always been individual. Would you suggest that the association adopt institutional membership?

☐ Yes

☐ No

Why or why not?

Do you suggest that membership dues be different for certain individuals versus others? (e.g. school representatives versus non-school)

☐ Yes

☐ No

Why or why not?

Are institutional/organizational budget cuts affecting you this year?

☐ Yes

☐ No

If yes, please explain.

ABOUT OTHER SASFAA BENEFITS

Which of the following SASFAA services have you used?	
<input type="checkbox"/> SASFAA member searches on the web	<input type="checkbox"/> Posting messages to the SASFAA listserv (versus just reading them)
<input type="checkbox"/> SASFAA newsletter	

**Please indicate which of the following SASFAA benefits you consider the most valuable by rank ordering their importance to you. ("1" is considered the most important service, "9" is of least importance to you.)**

SASFAA member searches on the web	<input type="text"/>
SASFAA listserv – reading financial aid news and association announcements	<input type="text"/>
SASFAA listserv – learning about job openings	<input type="text"/>
SASFAA listserv – being able to post messages to the membership	<input type="text"/>
SASFAA newsletter	<input type="text"/>
The opportunity to network with colleagues	<input type="text"/>
The opportunity to volunteer at an event or on a committee	<input type="text"/>
The opportunity for leadership development as a SASFAA officer	<input type="text"/>
The opportunity to support SASFAA in legislative advocacy efforts	<input type="text"/>

**Would you suggest that SASFAA expand its offerings to include any of the following? Check all that apply.**

<input type="checkbox"/> Webinar training	<input type="checkbox"/> Scholarships to attend SASFAA events
<input type="checkbox"/> A structured mentoring program	<input type="checkbox"/> Other

**Do you have any other comments that you wish to share?**

**If you wish to be considered for the \$25 VISA card please provide your e-mail address below (optional - will not be identified with your survey responses).**

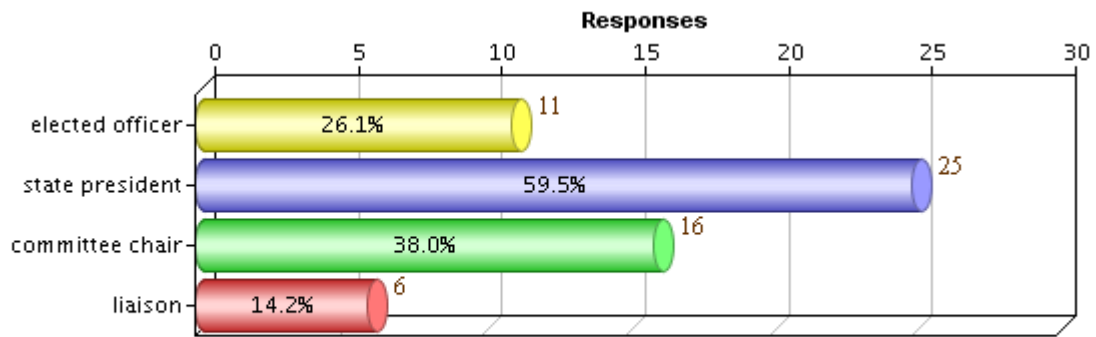
E-mail:	<input type="text"/>
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**THANK YOU! Your feedback is greatly appreciated!**

*SASFAA exists to serve the needs of its membership. With your help, SASFAA can continue to provide the support and training we all need in order to do the important work of our profession - helping students afford a higher education.*

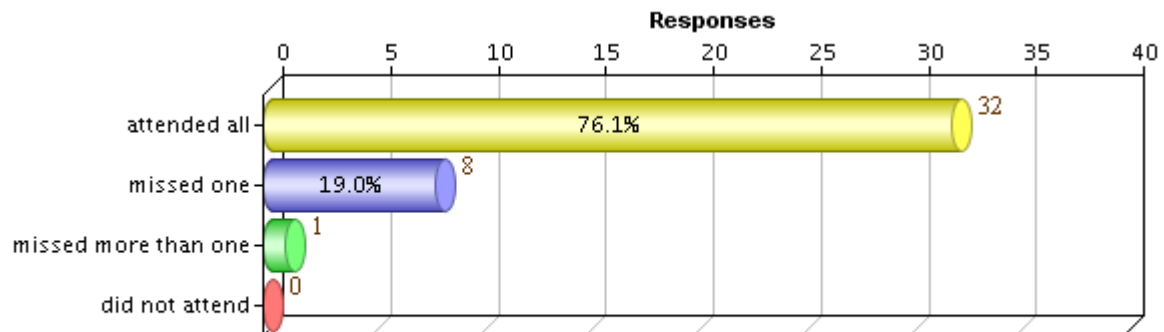
## ATTACHMENT C SASF<sup>AA</sup> PARTICIPATION SURVEY RESULTS

### 1. Indicate your role(s) on the SASFAA Board (check all that apply):



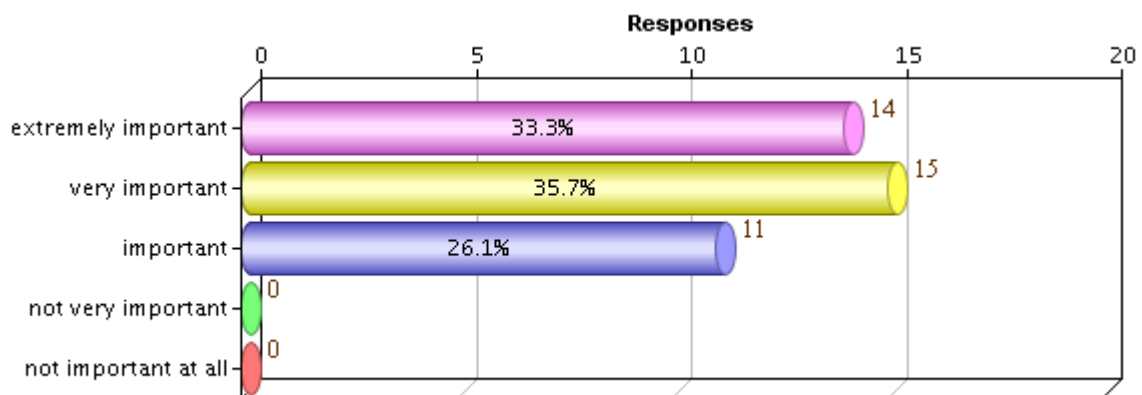
Total Number of Responses for this Item: 42

### 2. Did you attend all of the Board meetings during your year(s)?



Total Number of Responses for this Item: 42

### 3. Please indicate how important you believe it was for committee chairs and liaisons to attend all meetings of the Board:



Total Number of Responses for this Item: 42

#### Please explain:

Based on the Committees I chaired, the information was constantly changing and the Board was kept apprised of the

developments.

Although email is an effective tool for relaying information, I do not feel it can take the place of meeting face to face.

Committee Chairs - definitely; Liaisons - not as much (i.e. could provide a written report)

While these meetings can be effectively conducted via conference call, there is, in my opinion great value in the face to face aspect of the Board meetings.

Each member provides a valuable role in communicating information to the board as a whole. I have felt my attendance was necessary at each meeting

It is important for the Board to hear what the committees are doing. Some may not be needed at every meeting, but some are. I think that is a decision the President needs to make.

it is very helpful to have folks in attendance in order to be able to ask questions, clarification, etc. i know conference calling is a possibility.

I think committee chairs should be present if they have items for the Board to vote on. If they have nothing to present, it is not necessary for them to attend the meeting.

Possibly each and every committee chairs & liaison does not need to be at every meeting. Possibly it could be determined based on each meeting's agenda and upcoming events. Additionally, teleconferencing may be a better option for them to give their report and field questions.

Even though they are not voting members of the board, I feel that their input is very vital to the business of the Association.

Chair and liaison attendance would seem to contribute to continuity in the governance of the association year to year.

Important to provide an update from the lending community and answer specific questions that were presented to the Liaison during the meeting and after the report to the board.

Face to face communication cannot be replicated.

They need to be fiscally responsible, involved, understand and sometimes even defend their roles and/or activities they coordinate for the association.

The Board only meets 4 times a year, and to have the most complete summary of activities, the Committee Chairs should be present. Chairs benefit from hearing the reports of others and seeing how priorities and problems are interrelated. Chairs receive excellent input from the Board that would not happen as easily without the face-to-face interaction. Finally, for leadership development, it is important for Chairs to watch the Board in action - the Chairs are often logical candidates for future SASFAA positions and they will be better prepared by having experienced Board governance.

While it may not be imperative that all committee chairs and liaisons attend "all" board meeting it is important that they attend when there are discussions concerning their particular area of responsibility and/or when there are issues affecting the profession and the association in which their input is necessary.

It's an excellent way for committees that interact/overlap with other committees to force dialogue re: projects they might be working on.

With all of our duties within respective employers, it is easy to miss out on the meetings and the issues that the Board faces.

I only say this because of the current configuration of the board. Without them in attendance we would miss their information. In some other states (VASFAA during the years I was on the board), the committee chairs report to an elected position on the board. That elected official (e.g., rep-at-large, secretary, etc.) is responsible for providing updates during the board mtg on the committee's progress. They basically give the committee reports for the various committees they supervise. The exception to this is the transition board retreat where all chairs and elected officers are in attendance. As such, the board is probably about half the size of SASFAA's. If SASFAA does not move to board configuration like this, then the attendance of the chairs/liaisons at the meetings is very important. However, if SASFAA changes the configuration so each chair reports to an elected position, then their attendance would not be as critical.

I think it is important to help build cohesion amongst the group and build future leaders.

It is a method of keeping the chairs and liaisons "in the loop" as far as Association business. They are aware of what's going on within the Association and how their duties and responsibilities may be affected. Also, it's a way for the chairs and liaisons to get input from others on the Board in relation to their goals. Some wonderful suggestions for committee activities for the year can be obtained from the Board and aid greatly in carrying out the committee or liaison's goals for the year. Also, it's a great networking tool--everyone on the Board can know each other and call on each other when necessary throughout the year. And, finally it's a way of rewarding the chairs and liaisons for their volunteer services to the Association.

It was important to have the chairs in attendance for the Board to hear first-hand what the chairs were planning and doing with their committees. With costs and budgets being something to consider, a good written report or having them available on the phone when their report is given may alleviate some of the financial demand on the budget.

I believe committee chairs should attend the particular board meeting that the agenda would dictate.

I believe it was important for the Board to hear the perspectives of the community I represented. My reports generated discussions that helped air viewpoints of partners to the school community.

Committee Chairs play an important role in decision making even though they cannot vote they bring different points of view to the discussions.

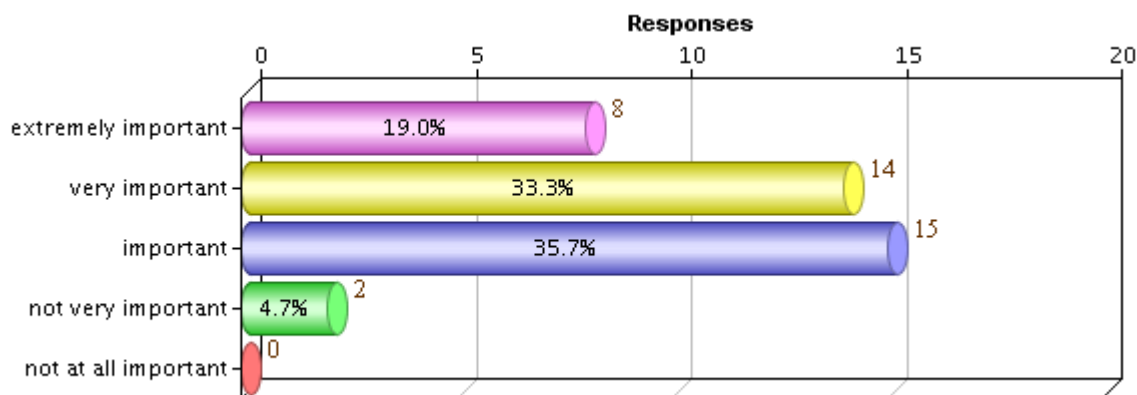
There may be times when only the voting members of the board need to meet.

Total Number of Responses for this Item: 42

#### 4. Please rank the importance of purpose for each committee/liaison in regards to the SASFAA mission on the SASFAA Board:

##### Agency Liaison

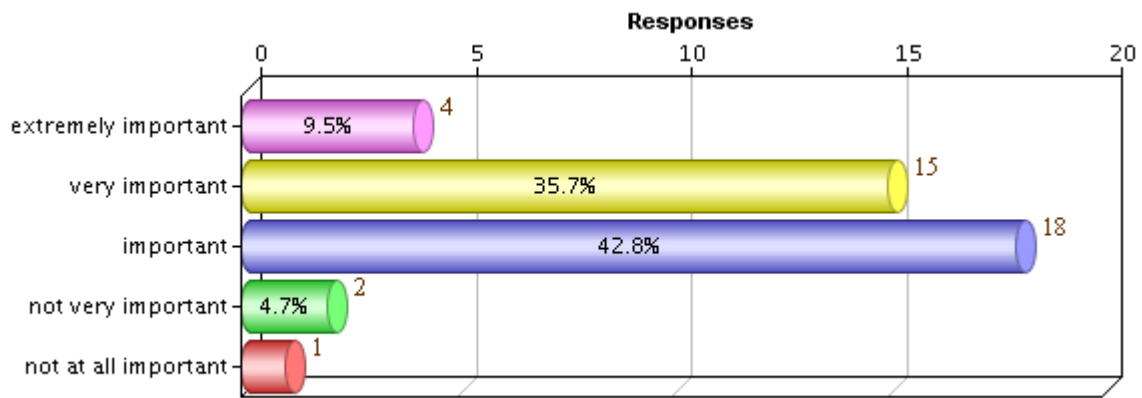
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Total Number of Responses for this Item: 42

##### Awards

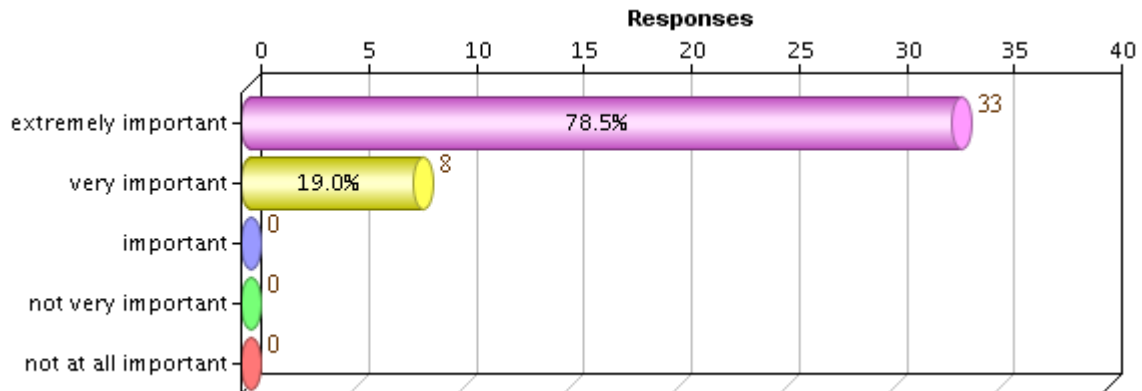
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Total Number of Responses for this Item: 42

#### Budget/Finance

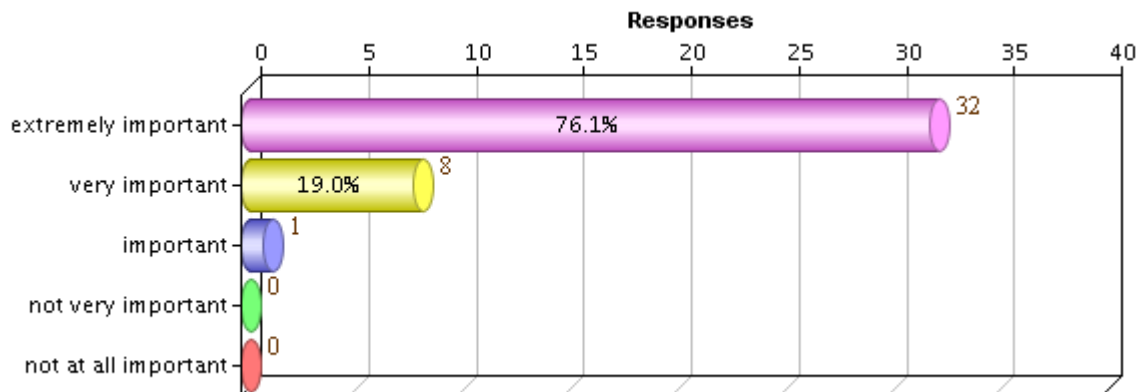
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#### Conference

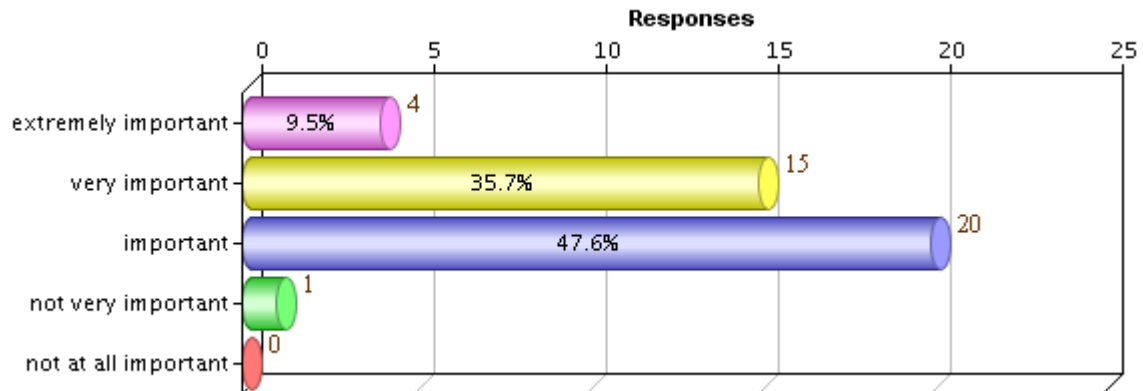
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Total Number of Responses for this Item: 42

### Diversity

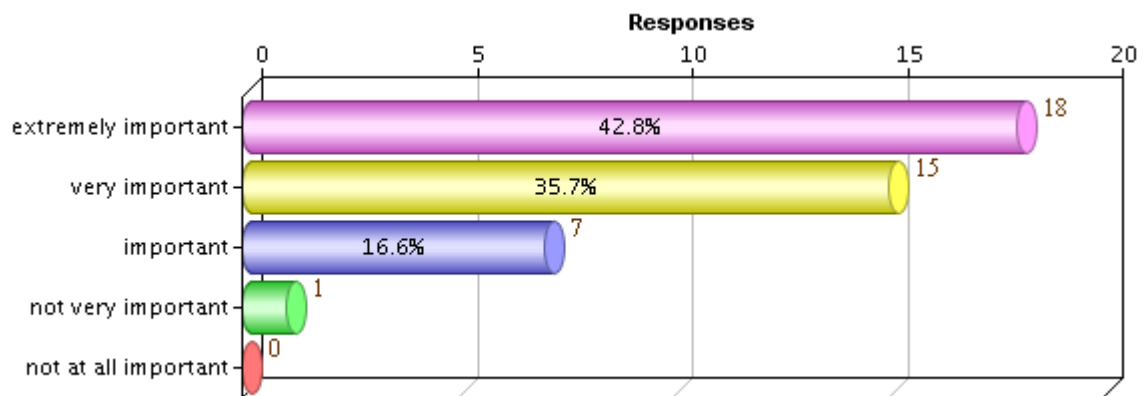
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Total Number of Responses for this Item: 42

### Electronic Services

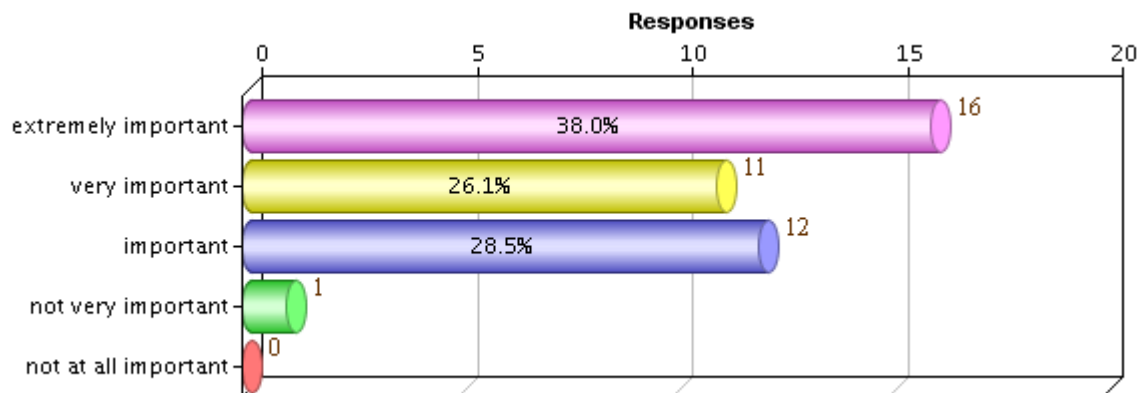
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Total Number of Responses for this Item: 42

### Governance and Planning

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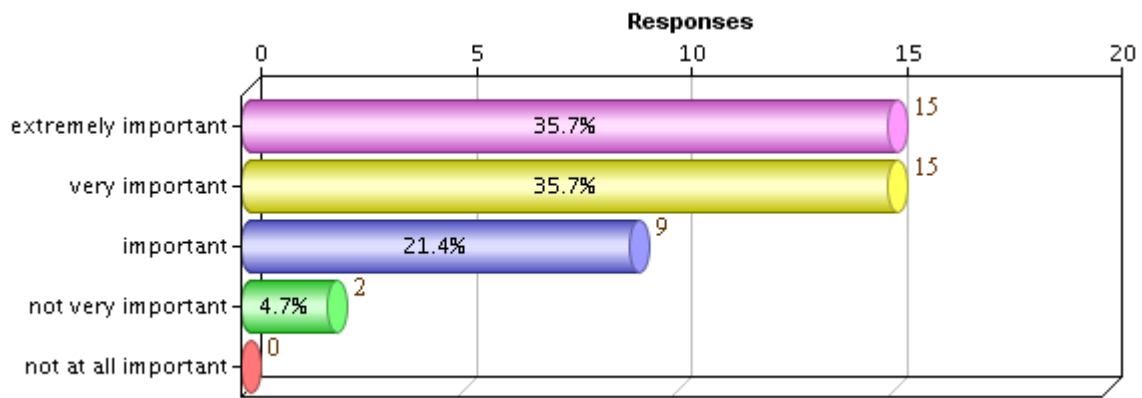


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### Legislative Relations

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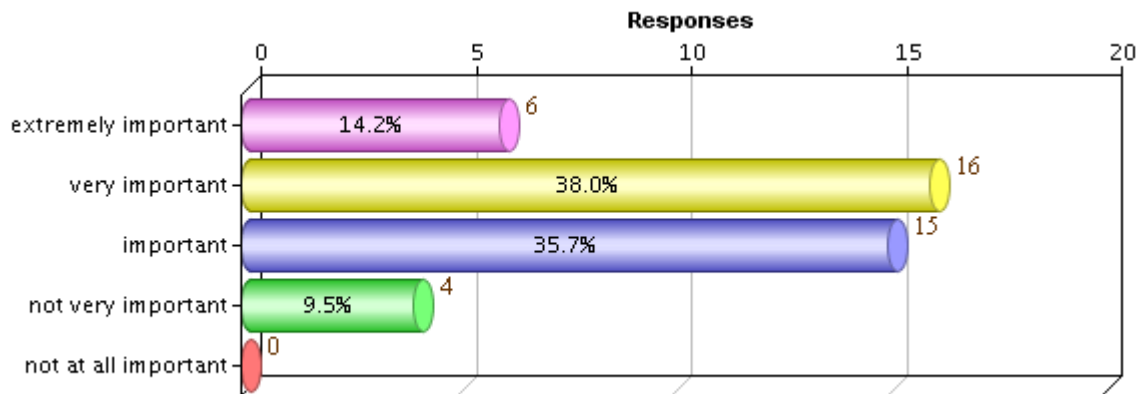




Total Number of Responses for this Item: 42

#### Lender Liaison

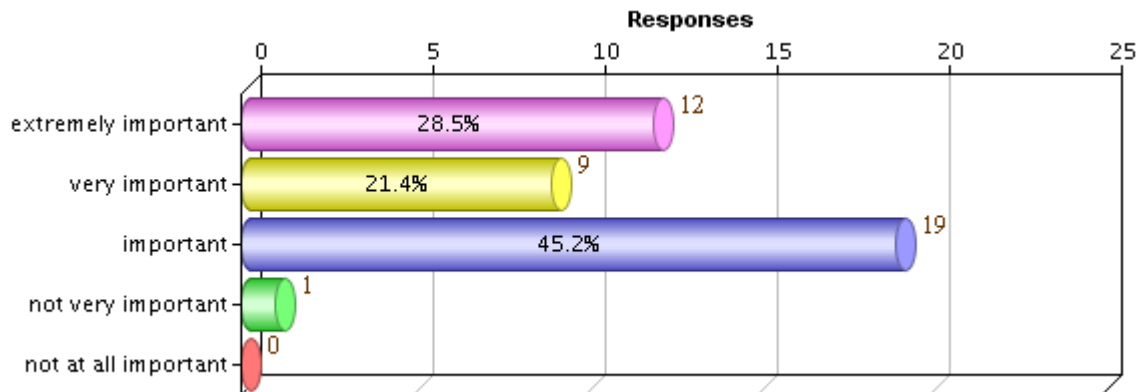
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Total Number of Responses for this Item: 42

#### Long Range Planning

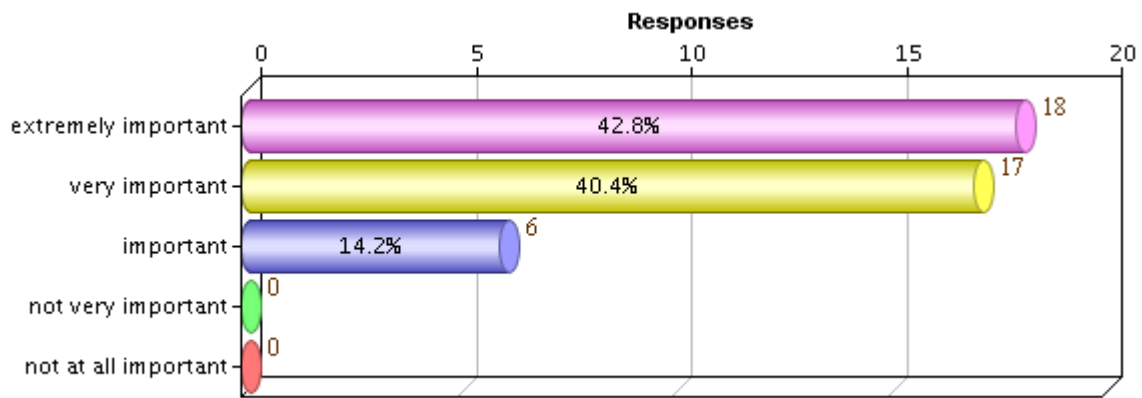
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Total Number of Responses for this Item: 42

#### Membership

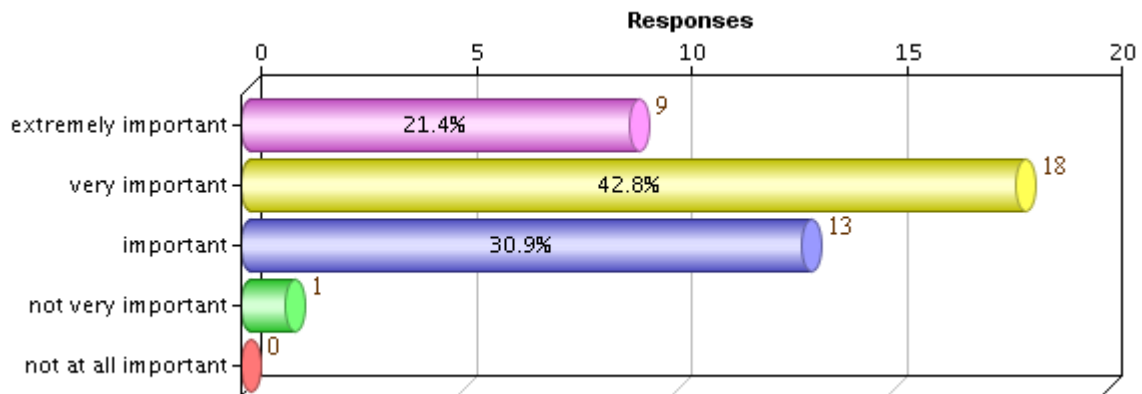
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Total Number of Responses for this Item: 42

#### Newsletter

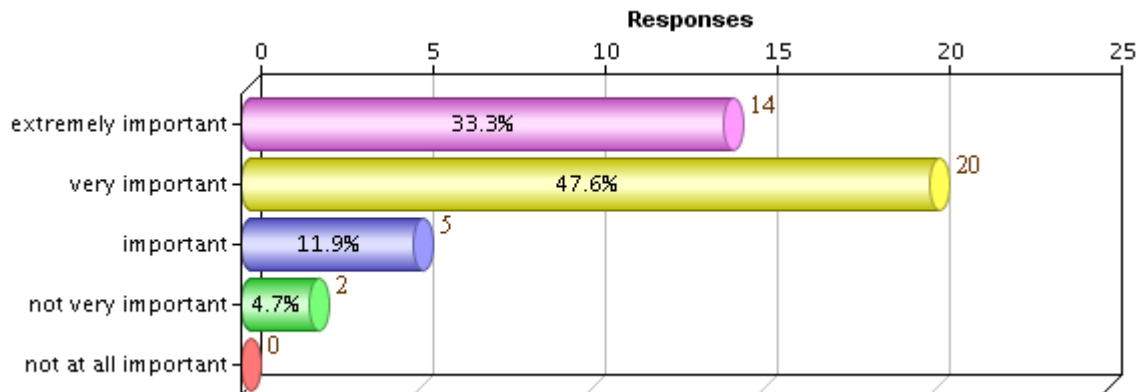
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Total Number of Responses for this Item: 42

#### Nominations and Elections

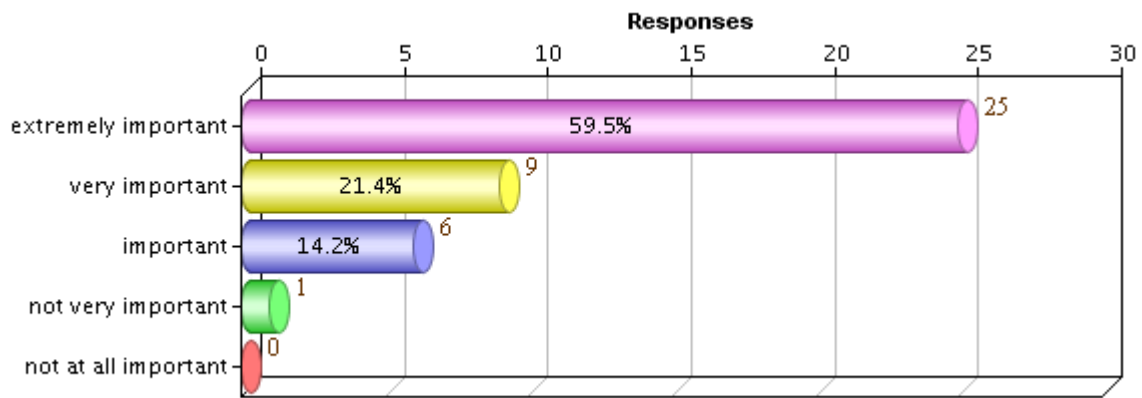
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Total Number of Responses for this Item: 42

#### Professional Advancement

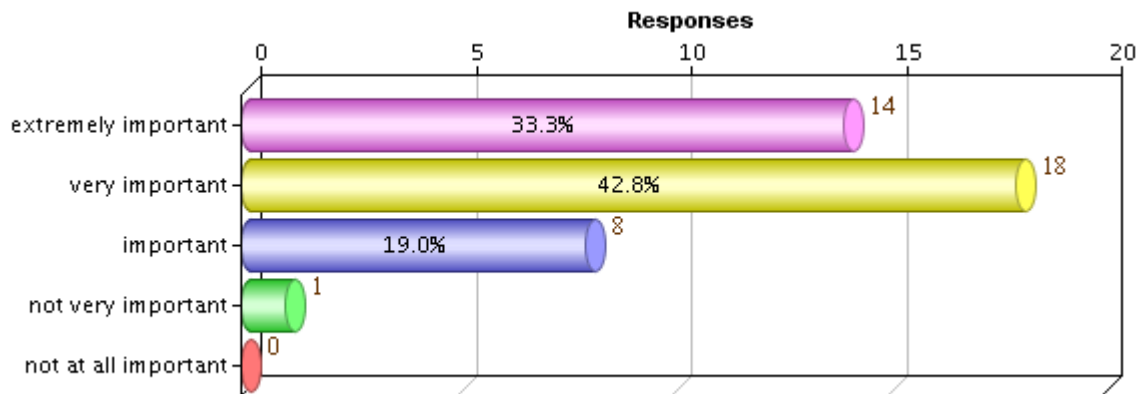
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Total Number of Responses for this Item: 42

#### Site Selection

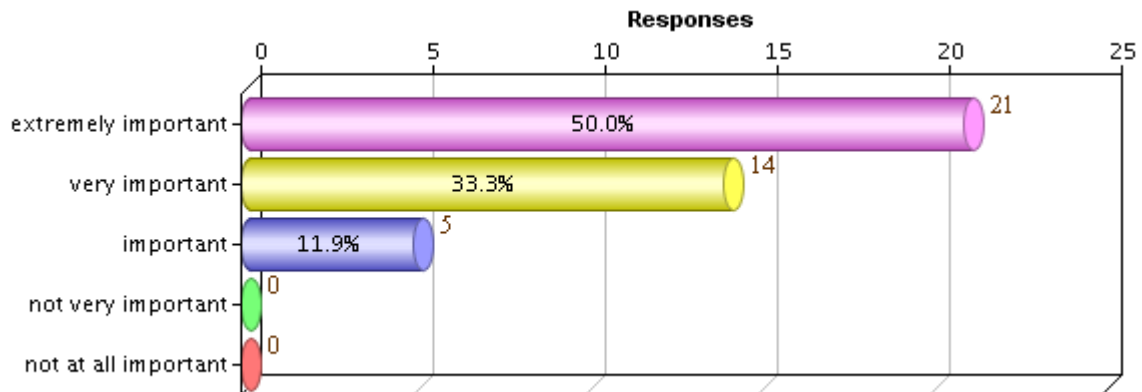
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Total Number of Responses for this Item: 42

#### Sponsorship

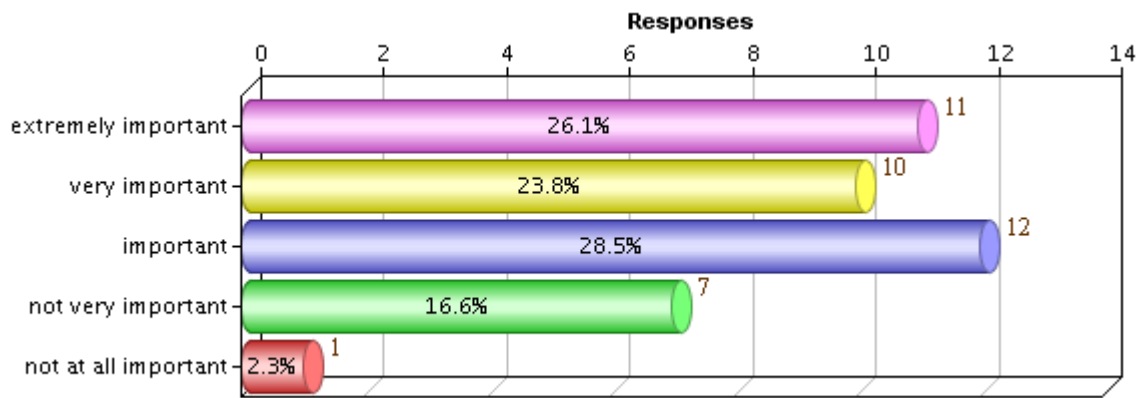
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Total Number of Responses for this Item: 42

#### US Department of Education Liaison

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Total Number of Responses for this Item: 42

**If there are committees you ranked as 'Not Very Important' or 'Not At All Important', please explain your rationale:**

either has run its course or no longer applicable. there are opportunities to get information out to the membership without having a newsletter (i.e. monthly update/bulletin from the pres). diversity has not been drawing numbers to sessions (concurrent or general) for a number of years.

Obviously, we can survive without this position as no one from the department has been able to attend (other than the board meetings prior to the conferences).

The U.S. Dept. of Education liaison has not been available in several years, so it is possible (although not preferable) for us to continue in this manner.

I did not rank any "Not Very Important" or "Not at All Important" but I do feel that it is not necessary that all of the committee chairs/liaisons attend all board meeting.

These positions can supply board reports and generally do not have 'breaking' news that needs to be addressed at board meetings. In anticipation of relevant news they could be asked to attend certain meetings.

My answers do not indicate that I think the current board configuration should remain as it is. I believe it is important to have information/work from all of these committees/liaisons represented on the board, but that does not imply a physical presence of the chair if the board configuration is changed. Based on the changes in the economy and our sponsorship, it may be time to look at other ways to do this and limit attendance.

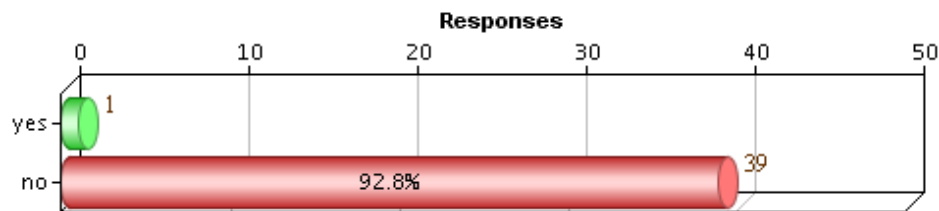
I am not sure how much value the liaisons bring to the board. Most of the time, they provide information we already know.

I would hate to say any committee lacks importance as why have such a committee? They are important, especially at certain times of the year. SASFAA might want to stagger the committee and allow chairs to attend one meeting during the year to address financial constraints.

Giving awards are not at the heart of what our profession does...we do not do what we do for recognition. I never have understood the necessity of having a lender liaison. I believe that the agencies chair and the legislation relations chair can keep the board updated on issues affecting the lending community.

Total Number of Responses for this Item: 42

**5. Do you believe SASFAA needs to add any additional committees to meet its mission?**



Total Number of Responses for this Item: 42

**If 'Yes', please explain:**

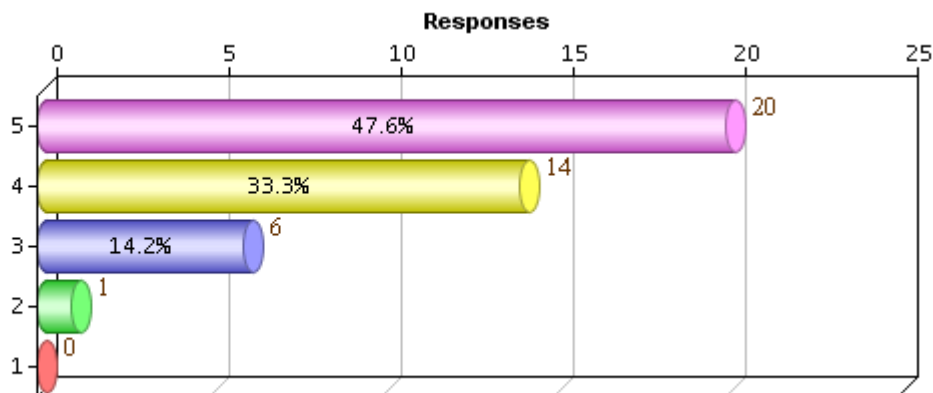
I think the association needs to have someone and a budget for Public Relations. The profession has been slammed in recent years with bad press we need to have some vehicle to promote our profession on a regional level

Not that I can think of for the moment.

At this juncture, I think all areas needed are well represented.

Total Number of Responses for this Item: 42

**6. Currently Board meetings are conducted in person. On a scale of 1 - 5, with 5 being crucial and 1 being not crucial at all, please list how important you view face to face meetings.**



Total Number of Responses for this Item: 42

**Please list your reasons:**

I do believe the number of face to face could be reduced to fall, conference and transition.

My reason is stated above.

A large number of people involved (I'm assuming we are talking about voting members and all committee chairs/liaisons). More conducive for discussion and interaction. Much can be accomplished even outside the planned meetings of the day which would not take place in other venues. Relationship building.

at least the first one of the year and the transition meeting should be "face to face". the november board meeting could be

done by conference call.

I believe that it is not necessary to hold each board meeting in person.

Without face to face meetings it is easy to lose cordiality. SASFAA is about the personal touch, if we lose that, SASFAA loses.

It is crucial for the Board to interact in person, but we may be able to eliminate one in person meeting in favor of a phone conference.

it is important to be able to discuss issues face to face. for some this is the only networking opportunity they may have within SASFAA. conference calling or e-voting is great option when it is not critical or for emergencies.

items are voted on and discussed at the Board meeting that I think would be confusing if we tried to do it by teleconference or email. in person is more efficient.

The most effective communication is a combination of visual and audio. Some issues are more readily solved by face-to-face interaction. Face to face promotes greater input and interaction. Promotes unity and camaraderie, which normally results in a cohesive group who are very supportive of each other and their respective roles.

The sharing of views and information is very beneficial. However, not every position may need to be present at each meeting.

Face to face provides more opportunity for meaningful interaction among parties discussing the merits, or lack thereof, of different issues.

There are too many distractions when you are not face to face.

I don't know how difficult it would be to hold conference call meetings. There is so much business that goes on I couldn't imagine being on a conference call for two days.

The state presidents may not be at all acquainted with anyone else on the governing board and should have the opportunity to "learn the people" as well as to learn the practices in governance of the association. It also depends on the business items on the agenda... budget discussions definitely need to be face to face; nominations too.

Some business can be handled via T/conf or video conference.

not all board meetings need to be conducted in person.

One of the most important reasons SASFAA and the state associations exist (other than training) is to facilitate networking and the building of professional relationships. Face to face meetings, especially in SASFAA where board members may or may not know each other personally, are very important to accomplish these relationships.

Face to face communication cannot be replicated.

Many times it is important to get away from the office to be able to change gears and think about SASFAA. Meeting face to face helps to stimulate ideas and discussion.

There is no disconnect option, if you are meeting face-to-face.

I think face-to-face meetings are much more conducive to meaningful discussion. You can have lengthier, more intensive meetings in this manner - accomplishing a lot in a few days. However, for issues that arise that can and should be handled quickly by the Board (for example - approval of Sharon Oliver as a replacement V.P.), e-meetings are great and economical. (I think conference calls work better with smaller groups.)

I do believe that face-to-face meetings are important; however, I also believe that it is possible that some board activities may be conducted in other than face-to-face meeting to save time, expenses, etc. Substantive issues should be dealt with face-to-face rather than by other means of communication.

There is no substitute for face-to-face interaction to foster teamwork and sense of purpose.

Initial board meeting should be face-to-face due to budget construction but after that - we meet at conference and end of year. The other meeting(s) could be held via conference call.

To ensure uninterrupted participation and to allow for better understanding of the meeting.

This is tough to answer b/c I think in part it depends on a couple of items. The first being the topics discussed at the board mtg. Some topics almost require face to face meetings. The second is the size of the board. Having board meetings via electronic means with 20+ people can be challenging...not impossible, but challenging.

I think they are important. However, maybe either the July or November/December meeting could be conducted via conference call or webinar.

Face to face meetings are very important; however, when feasible conference call meetings can be just as effective and cost considerably less. Options for conference call meetings should be at the discretion of the chair, whether for the Board or committees, etc.

The advantage of having a face to face meeting is that you are able to communicate better because you can observe the individual's verbal and non-verbal communication. Sometimes non-verbal communication tells you more accurately how the individual really feels about the issue you are addressing.

I am giving this one a 3. Face to Face is important, but during tight times, it may not be as important as originally thought. Accommodations can always be made and business can always be conducted within the scope of the budgetary constraints.

I do not receive the same interaction with a webinar as I do with a face to face.

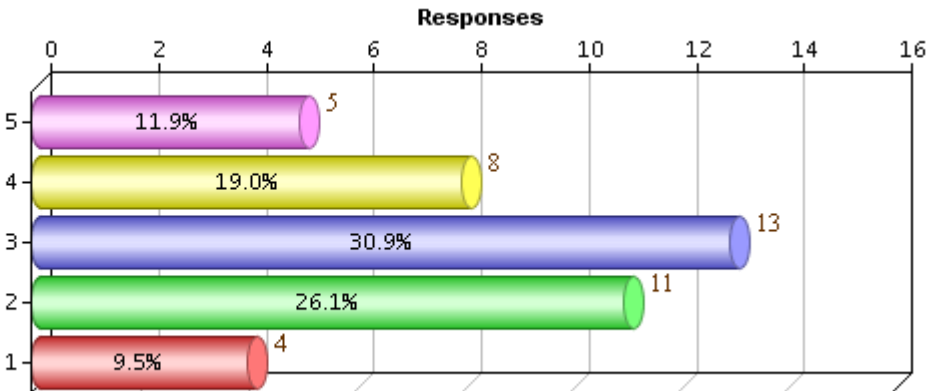
The face-to-face meetings help to develop relationships that are valuable and long-lasting. Getting to know the other Board members - both during the meetings and in social settings - is an important networking opportunity.

When people meet on the phone I believe sometimes other things are going on around them and they do not pay close attention to what is going on in the meeting.

Again, there are some times when a face-to-face meeting of the entire board is not necessary. Conference calls can be just as effective.

Total Number of Responses for this Item: 42

**7. Currently Board meetings are conducted in person. On a scale of 1 - 5, with 5 being a very viable alternative to face to face meetings and 1 being not viable at all, please provide your opinion regarding Board meetings held via webinar.**



Total Number of Responses for this Item: 42

**Please list your reasons:**

Too costly and a simple teleconference would do.

This may be an alternative, but I would not want to make this a permanent thing until it is tried a couple of times.

I guess I'm putting 1 because of not knowing how it would functionally work. I've been involved with several webinars this year due to software implementation going on. It was basically a conference call with screen navigation taking place by a lead. Not exactly sure how this would work with conducting SASFAA business.

not sure how a webinar works, but need to ensure when voting takes place, we have an avenue to do that. I would think a conference call is easier for voting purposes.

I have found that the face to face meetings are much more enriching than electronic meetings. Webinars may provide better content than plain conference calls.

Perhaps a regional webcast where those from the same state get together and log in together to participate in the meeting with a web cam in every site. I would vote for one meeting a year conducted that way.

I think as an alternative to one meeting it would be fine.

i am middle of the road. i think for those that can't attend, this is a great option so they don't miss out and neither do we. webinars just aren't the same to me.

I am doubtful. see comments from number 6

Although in person is the most effective (in my opinion), webinar is a viable alternative and certainly would be more cost effective.

Personally don't receive the same benefits of face to face. However, it is a good alternative occasionally. Length of meeting time a concern.

The webinars I have viewed did not provide the meaningful discussion I mentioned in #6 above. Also, it seems that audio and video quality is a problem almost every time the meeting or presentation is by webinar.

Only if budget constraints make it difficult for the required quorum to be met.

It is an option that I would like to see in action first.

The state presidents may not be at all acquainted with anyone else on the governing board and should have the opportunity to "learn the people" as well as to learn the practices in governance of the association. It also depends on the business items on the agenda... budget discussions definitely need to be face to face; nominations too.

Would recommend this as an option for two of the four meetings. The initial and last meetings of the board should be held in person.

I believe that webinars would not do as good a job at facilitating the building of relationships, as much of this takes place outside the meeting itself.

It is not always the actual board proceedings that make face to face meetings beneficial. The "on the side" conversations and discussions that are very important to the health of the association. This would be lost via webinar meetings.

Unless finances make the face to face meetings not viable, I don't think we should switch to holding the meetings via webinar.

face-to-face interaction cannot be replaced

Similar to the reasons above, webinars are not conducive to meaningful discussion. They would be an alternative if the intention of the meeting is to cover material that can be done in about an hour. It is also more suited to training, where the webinar is presenting info. This method doesn't lend itself to changes of direction in a meeting discussion, etc.

I am not opposed to this alternative; however, depending on the issue(s) to be discussed I am not sure that this is the best alternative.

The meetings tend to push the envelope in terms of time - interaction and flow of meetings would slow down. However - it



might encourage less tangential conversation; keep meeting on point.

See #6 above

I think this could work for some meetings, but not all. We can't be on an webinar for two days (ha!). It depends on the nature of the meeting.

However, maybe either the July or November/December meeting could be conducted via conference call or webinar.

I'm not convinced webinar meetings are as effective as face-to-face, although occasional use might be acceptable.

I assume holding a meeting via webinar would be viable, but it's sort of hard for me to imagine (with my limited knowledge of how a webinar is conducted) having a board meeting via webinar. It seems like that would take a lot of time, what with having to type in your comments and then receiving a response. Plus you run the risk of "losing" participants this way. If they are in their office viewing a webinar, and something occurs within the office, it's much easier for them to just leave the webinar and go tend to the business of the office. I don't think you always have a "captive" audience with a webinar.

Again, the association needs to do business with budget/cost in mind.

I just do not like webinars for conducting business.

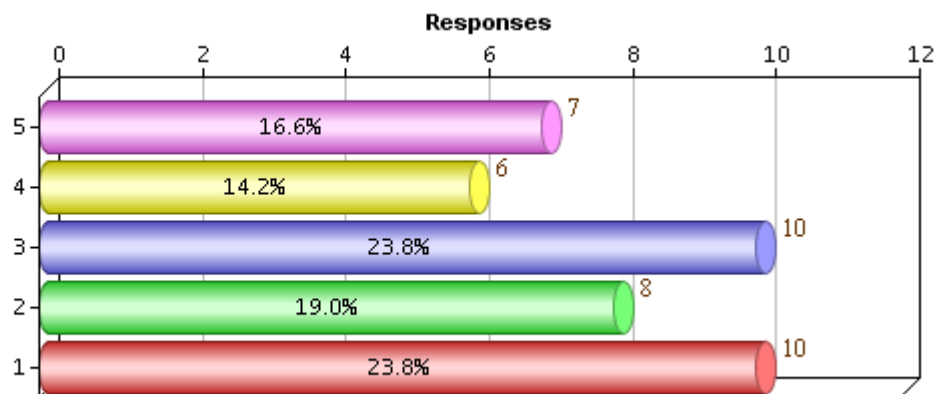
Could be a substitute for a business meeting with a limited agenda, but it is difficult to maintain focus for an extended period and does not allow for much personal interaction.

I am not very fond of webinars.

I do not see this as being effective.

Total Number of Responses for this Item: 42

8. Currently Board meetings are conducted in person. On a scale of 1 - 5, with 5 being a very viable alternative to face to face meetings and 1 being not viable at all, please provide your opinion regarding Board meetings held via conference call.



Total Number of Responses for this Item: 42

**Please list your reasons:**

Limit to one of the meetings,

I feel that during conference calls full attention may not be being paid by all participants. It is too easy to be distracted with checking e-mail or other interruptions. This may also be the case with webinars.

I think this could be a last resort venue. Perhaps only necessary if expenses must be cut.

see comments to #7

Conference calls that are short in nature may prove valuable, but I believe that conference calls of any length are generally not very productive.

I think they are ineffective, there often too much to go over.

I prefer a webinar. Now you can have a webinar where people can vote electronically and interact as if in a meeting. Conference call can be used if it is more financially beneficial, but webinar should be the first choice.

same as above. i think we can certainly see this as a viable option for e-voting or emergency issues, but not our primary means of meeting.

see comments from number 6.

Personally don't receive the same benefits of face to face. However, it is a good alternative occasionally. Length of meeting time a concern.

OK where only one or two items of business are to be discussed and not for an extended period of time. Otherwise, wait until the next regularly scheduled board meeting to discuss the issue, if possible.

I believe conference calls <in individual offices> are very possible if the meeting is structured so that individuals can respond to issues and questions in a very structured way, but it would be very difficult since each person would not be able to know who speaks next, etc. and it may cause too many cut-ins or interruptions.

I think it would be too confusing and too hard to control.

The state presidents may not be at all acquainted with anyone else on the governing board and should have the opportunity to "learn the people" as well as to learn the practices in governance of the association. It also depends on the business items on the agenda... budget discussions definitely need to be face to face; nominations too.

Sometimes lose personal touch.

I don't believe that conference calls truly include everyone. It is also very easy to be multi-tasking and not truly focused on the meeting when the meeting is being conducted via conference call.

It is not always the actual board proceedings that make face to face meetings beneficial. The "on the side" conversations and discussions that are very important to the health of the association. This would be lost via webinar meetings.

I definitely don't think we should hold the meetings via conference call.

face-to-face interaction cannot be replaced

I think conference calls work better with smaller groups. A lot of committee work can be conducted via conference call effectively, but meetings of the full Board would be difficult to manage this way.

Conference calls are an acceptable alternative in the event time, travel, expense, etc. should dictate this type of activity as opposed to face-to-face board meetings. Again, I think it would be wise to look at the agenda closely to see if it is necessary that all committee chairs and liaisons are needed at each of the board meetings. Savings can be achieved by looking carefully at what is to be discussed and whether or not particular individuals should be in attendance.

Too difficult to manage.

See # 6 above

See #7

However, maybe either the July or November/December meeting could be conducted via conference call or webinar.

The more lengthy the agenda, the more important it is to have face-to-face meetings. Conference calls can be effective for addressing individual "follow-up" items.

I rated conference call more viable than webinar because I think business maybe can be conducted quickly because you

have everyone on the phone giving input rather than typing it on the screen via webinar. However, you still run the risk of "losing" people as well as not having a "captive" audience. You may still "lose" people in a face-to-face meeting (in that they may not be paying attention or daydreaming, but you do have a "captive" audience.

Same rationale as previously given. Camaraderie and collegiality suffer at budget expense.

I just do not like conference calls for conducting business.

Could be a substitute for a business meeting with a limited agenda, but it is difficult to maintain focus for an extended period and does not allow for much personal interaction.

See above comment

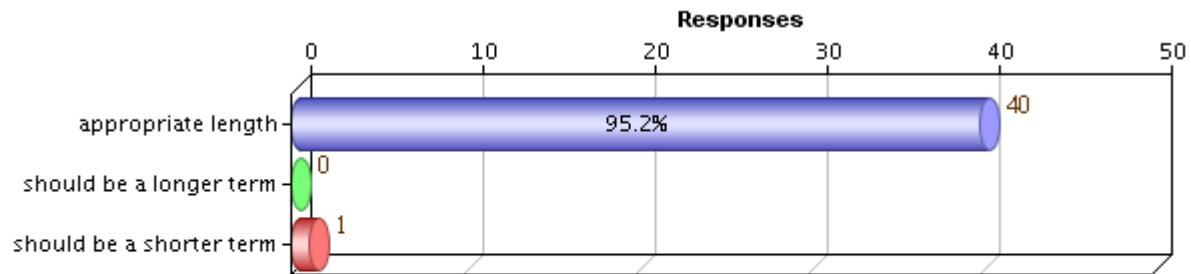
Extremely cost-effective approach.

Total Number of Responses for this Item: 42

## 9. Rate the length of term of office for the following elected officers within SASFAA.

### President (3 years)

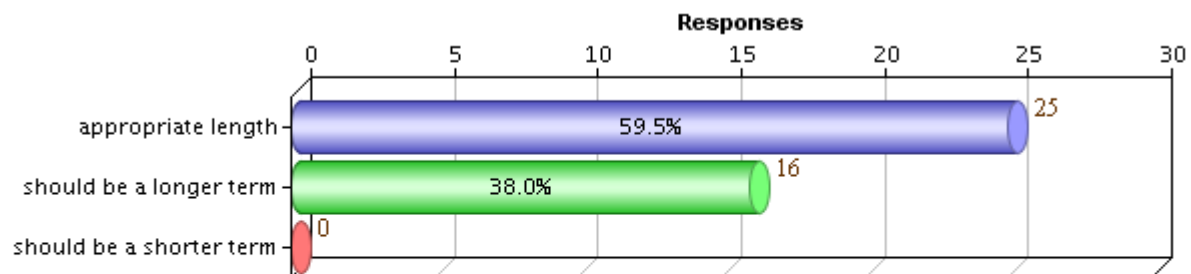
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Total Number of Responses for this Item: 42

### Vice President (1 year)

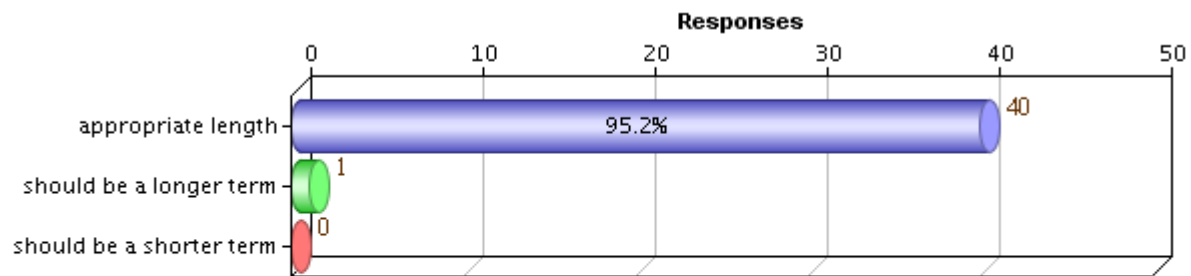
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Total Number of Responses for this Item: 42

### Secretary (2 years)

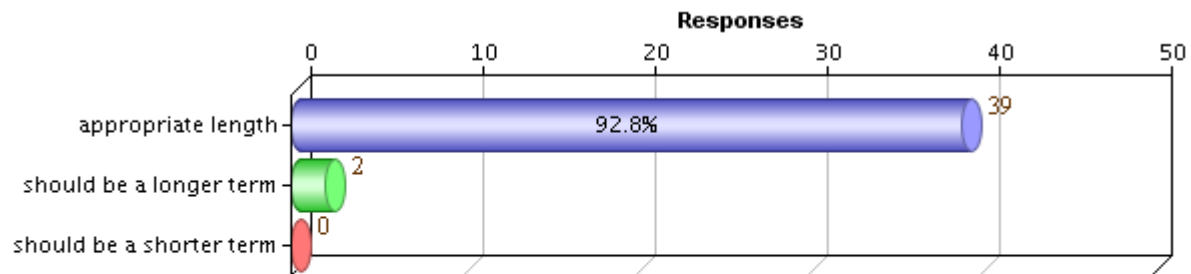
1900027	11	400210205
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Total Number of Responses for this Item: 42

#### Treasurer (2 years)

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Total Number of Responses for this Item: 42

#### Please list your reasons:

It really takes a year to get in the groove. Treasurer should be maintained at two years for fiscal responsibility.

I feel these terms are sufficient as they are. Given more time in office then this I feel may lead to too much control of the organization. It is always good to have fresh perspectives on current affairs.

I wish they could be shorter, but the association needs continuity

Three years is a long time for one person to commit, but needed in the case of a President. One year isn't enough time to get things organized. Two years is just right.

i believe in Treasurer-Elect. many states have adopted it and it works out much better for the Treasurer. Plus we have gotten more folks to run because of that option where they know they will have prior training. VP is a BIG job for NAO. i think it would help to have the same person in that position for 2 yrs so they can develop items over 2 yrs instead of rushing to get it all done in one.

The President, Secretary, and Treasurer positions have so many details that it would make it more difficult to develop proficiency in the position in a shorter term fo office.

standard terms of office

For the sake of continuity.

The only office I might lean toward making a longer term is Treasurer, however, I think that would probably not be a good idea, since it is already difficult to find members willing to run for that office.

Seems to have worked well over the years. I would be open to discussing the VP going to 2 years if we could figure a way to stagger the elections with the Secretary and Treasurer.

I think the terms are fine. Most people don't want to commit to longer terms. It can be hard to find people willing to serve for 2-3 years sometimes, but the positions with those terms (Pres, Sec, Treasurer) are appropriate since there is a build up of expertise that is beneficial to the Board - creates stability etc. I do think we should have a Treasurer Elect, though, to allow better training and transition for the next person.

The current three year term for the President is appropriate as are the two year terms for Secretary and Treasurer. I believe that the Vice President position should be a two year term due to the nature and complexity of the position.

President - need the P/E, P, and PP years. VP - much work with the NAO Workshop and serves its purpose. Continuity for the other two offices.

I think having the VP a two year term would work out well when considering that position's responsibilities.

In looking at a good number of other organizations, I think we have it right.

Vice President: longer term would provide more continuity, particularly for training agenda. Secretary/Treasurer: persons seated in these positions may be re-elected (?).

I think the length of term for each office is appropriate to get the appropriate jobs accomplished.

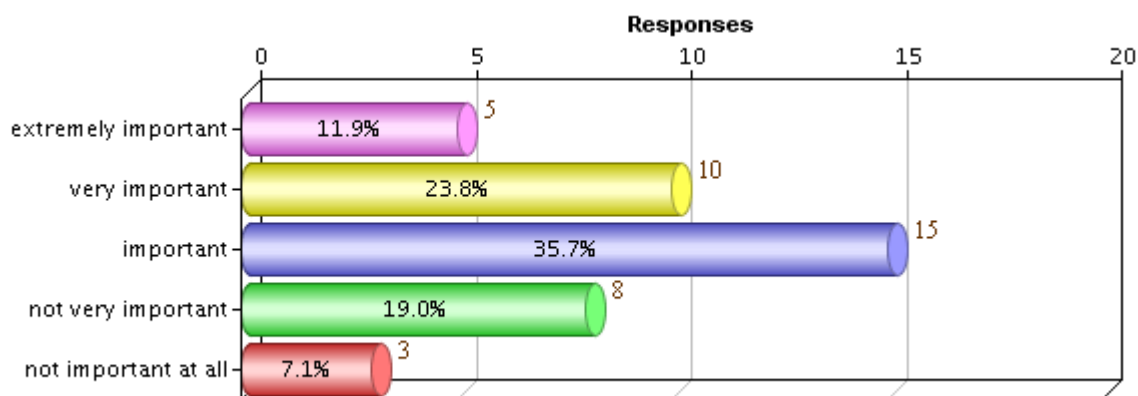
If any longer terms are made, it may force some members from volunteering and running for office. Any shorter, the job may not be done as well. Secretary and treasurer positions are overwhelming enough already. They may need some type of assistance to give some relief. Maybe an assistant for secretary who may be in training to take over if needed. Maybe a specific member of the finance committee who could assist the treasurer if needed.

I don't see anything about the current terms that needs to be changed.

I believe the VP position should be a longer term (2 years) because once they get something started it ends and good programs they began doesn't always carry over to the next year.

Total Number of Responses for this Item: 42

**10. Currently the location of the SASFAA Annual Conference rotates between the nine states. How important do you believe it is to rotate the location among the nine states?**



Total Number of Responses for this Item: 42

**Please provide your comments about rotating the location versus finding a longer term venue that is centrally located in order to save money.**

There are some states that have difficulty in providing a good option for sites.

I think it is important so each member gets somewhat of a cost break in travel when it is located near them.

I think it's important to rotate as long as possible financially. Gives individuals opportunity to travel to other states. The host state would hopefully have more involvement from its state membership which hopefully would generate continued involvement in SASFAA later on. Although if holding the conference in one state for more than a year would help to substantially reduce costs then I think this is something to consider. A rotation could still exist but every 2 or 3 year maybe.

I like the idea of bringing SASFAA more to the membership who might otherwise be unable to attend, but understand the benefit of having a longer term contract for savings to the Association. With number of conference attendees decreasing, more options will be available in every state - but we need to look also at the "not so swanky" sites.

I believe each states needs the opportunity to host as equal members of the association

I think a venue that is central could be used if it is in the right location. We have to save money and reduce costs, both for the school and the association. Business as usual simply isn't going to cut it in today's market place.

i am torn. i think we have to be fiscally responsible and utilize states that have better hotel costs with easy access in and out of the city. but i also see validity in visiting each state. some states though cannot afford to host some years. so if it places a burden on the state, i am for skipping over it. For ex, MS after Katrina hit. i say put it to a vote with the membership of each state and see what they say. most states probably don't care one way or the other.

Although I believe it is important to rotate among the nine states, it would be much better to continue to provide quality professional development opportunities for SASFAA members in the most cost effective way.

A few centrally located locations that save money and maintain acceptable attendance is fine.

I believe a more centrally located venue would be a very acceptable proposal versus the constantly changing venue. Ideally, more people might be able to attend on a regular basis versus attendance at a site that is more distant, i.e., Crystal City, VA.

The local arrangements folks would burn out fast. It would not be fair to put it all on one state all the time. Also, the local state association puts a lot of money into the conference when it is in their state. That would not work at all.

The major point for participants would be travel requirements.

I think we need to take a look at the cost of the places we have the conferences. Always having it in every nine states is not always the best option money wise.

I like the idea of rotating the conferences, BUT... Having participated in the 2008 Budget discussion it seems to me that SASFAA must dramatically bring down costs as soon as possible in order to continue to provide high quality training and networking opportunities. By continuing to spend down the SASFAA Reserve we could wind up spending ourselves out of meaningful existence if we are unable to generate significant exhibitor support as time goes on.

SASFAA Should look for the best cost versus rotation of the meeting location.

I believe that rotating the venue is advisable, since it makes each state feel more like they have a stake in their regional association. Each state having some "ownership" (using the term loosely) every 9 years is a good idea.

It is important as I think states enjoy being able to host the conference. However, we do see significant ups and downs in attendance based on location. The larger conferences have tended to be in locations that are more centrally located.

I believe it is more beneficial for members and SASFAA to consider central locations vs state rotation.

I think it is important to rotate the conference so the burden of local arrangements does not always fall on the same state. However, if a better hotel rate could be negotiated with a long term contract, I think we should go for it.

However, there has to be a "fiscal" responsible option that could make that impossible

Rotating between the 9 states is a "nice to have", but not a "have to have". At this point, we should find convenient and relatively affordable locations for the conference. That is more important for getting good attendance. Financial concerns are the bigger driver now.

I support the current rotation of the conference among the nine member states. It is imperative that each state association and state membership feels an "ownership" of the association. Having sat on the NASFAA board this was an issue there as well when the national association was not as diligent as it might have been in rotating the national conference among the member associations. While the issue of budgets for members and their institutions are important, I am not sure that meeting in one or more central locations is the key to continued involved membership involvement within the association.

Money is saved for both SASFAA and the conference attendees when at a central site.

I did not note extremely important due to the economic conditions. The value of having SASFAA within each state is to allow for some members to attend who may never be able to attend otherwise.

We are going to need to change some of practices in order to survive in this economy, and it may be time to look at more cost effective sites rather than just rotating to each state to be fair. Of course, there will be those in the membership who feel it is unfair that SASFAA may not be held in their state and that they may always have to pay travel expenses b/c of that; however, for the stability of the association's finances, we may want to start looking more for cost effectiveness rather than a straight rotation schedule. With that said, if we can rotate between some states and still be cost effective, then that's great, but not necessary.

I think it is important, but maybe not as important as it used to be given cost considerations. The main thing is to provide the training at a reasonable cost. If we are in locations that are cost prohibitive, we are defeating our own mission.

Recommend scheduling a central location for a few years, perhaps three, in a row as a live "test" then survey to measure the results, if "saving money" is the utmost need. In addition to savings on travel, this assumes that a less expensive central location could be acquired--perhaps on a three-year contract negotiation.

It is an honor to have SASFAA come to your state, and I believe that every state feels that way. Plus, it's good to visit the various nine states; some people may never have an opportunity to visit a state if it were not for the SASFAA conference being held there. Although I indicated that it is extremely important to rotate the states, I do realize that it may not be prudent in today's economic conditions. Perhaps we could find a longer term venue that is centrally located in order to save money until the economic crisis has been resolved, and then start the rotation again?

I think we need to name major southern cities as permanent venues for the conference. If we cluster the 9 states around 3 permanent venues, those states could take turns in hosting the conference, as their geographical identity is near that venue. Again, creativity is the key to success in saving our funding for our prime mission.

I do not feel we absolutely need to hold the SASFAA Conference in each state. Central locations and ease of travel outweighs rotation.

I like going to different locations - hosted by different state associations - to get a flavor of each SASFAA member state. It also gives each state association the opportunity to get its members involved in their state associations and exposed to the value of SASFAA.

I feel it is important to have all states represented however, I think every effort should be made to find locations that are easy to fly in to and where flights are fairly inexpensive.

There are regions within SASFAA that are extremely expensive. Finding a couple of central locations that are affordable and alternating between the two makes much more sense. Atlanta and Nashville are possible sites. Also, why do we continue to have the transition retreat at the Don Cesar? Such extravagance paints a poor picture of our association, especially in this time of economic hardship and increased scrutiny of our profession.

Total Number of Responses for this Item: 41

## ATTACHMENT D

### MEMBERSHIP SURVEY RESULTS

#### SASFAA Membership Survey 2008-2009

(422 responses received)

*The world of financial aid is changing rapidly. How can SASFAA best support you in this volatile environment? More than ever, we need your input in order to plan for the future!*

*This survey is being sent to past and present members of SASFAA. We need to hear from ALL of you. Please help us determine the most effective programs and services we can offer, and what membership benefits would be most valuable to you.*

#### ABOUT YOU

##### Which of the following best describes the organization you work for? \*

74	Public 2-Year College	103	Public 4-Year College
2	Private 2-Year College	117	Private 4-Year College
17	Graduate or Professional School	13	Career School
31	Student Loan Lender	3	Student Loan Servicer
40	Guarantor	9	Consulting Group
5	Government Agency	1	Financial Aid Software Company
7	Other (non-profits, foundations, etc.)		

##### How many years have you been in financial aid? \*

15	(0 - 1 year)	72	(2 - 5 years)
82	(6 - 10 years)	64	(11 -15 years)
60	(16 - 20 years)	129	(21+ years)

##### How many years have you been in SASFAA? \*

59	(0 - 1 year)	124	(2 - 5 years)
75	(6 - 10 years)	60	(11 -15 years)
37	(16 - 20 years)	67	(21+ years)

##### Are you serving SASFAA in any of the following capacities for 2008-09? Please check all that apply. \*

21	Session moderator	31	Session presenter
13	Event sponsor	64	Committee member
7	Committee chair	9	State Association President on the SASFAA Board
6	Elected SASFAA Officer	314	Not Applicable

##### Have you served SASFAA in any of the following capacities in years past? Please check all that apply. \*

116	Session moderator	89	Session presenter
33	Event sponsor	127	Committee member
48	Committee chair	69	State Association President on the SASFAA Board
31	Elected SASFAA Officer	239	Not Applicable

##### Are you currently a paid member (or Honorary Member) of SASFAA for 2008-09? \*

365	Yes	33	Not yet, but I intend to join	24	No, I will not be a member this year
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If you will not be a member, please let us know why you will not be joining SASFAA this year. **We truly need your honest feedback.**



**Check all reasons that apply and elaborate below. \***

3	I no longer work as a financial aid professional.	3	Although I am in financial aid, I no longer work in the SASFAA geographical area.
25	I am not going to be attending the conference this February.	21	My organization will not fund me to participate in SASFAA activities.
0	I am not interested in SASFAA. Explain: <input type="text"/>		
Other: (21 responses)			

Budget Cuts.
Budgetary constraints
Conference timing has always been a problem with my schedule. Also, as with all, some years conferences have been excellent other years, not so good. Also I will retire next year.
Due to the budget cuts my organization is unable to fund it at this moment.
i am a member
I am a paid SASFAA member. I cannot attend the conference due to budget cutbacks (travel).
I am a retired past President.
I am not sure whether or not I will be attending the conference in February.
I do intend to be a member, but due to my personal finances I have yet to pay the membership dues. Also, my organization has just decided to not send me to the conference this year, and I can not afford to pay for the conference on my own.
I have volunteered for the NAOW, but may not be able to participate in the conference in February.
I may retire this year.
I will be a member.
It isn't essential for me to be a member, whereas some of my colleagues need to be apart of SASFAA so the funding goes to them.
My institution does not pay for membership fees. I must pay out of pocket. I am a paid member of my state organization.
My travel budget has been lowered to \$500 due to extreme budget cuts in Florida. I have to pay for memberships myself.
N/A
no longer living in the SASFAA region
not attending due to cut in budget
Potential job change and don't want to ask my employer at this time.
Site of workshop is too far to drive - husband will not fly -I have to bring him as he cannot be on his own for a long period of time - he has Alzheimer disease
State budget cuts don't allow for travel any more.

Please add any additional comments here, related to the reason above (8 responses)
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Because of budget constratints the institution will only pay for those individuals that are officers to go
Budget cuts - all out of state travel suspended.
I am a paid member for 2008-09, but will not be attending the annual conference due to budgetary reasons
N/A
staffing shortages and funding issues
State budget cuts have severely limited our staff's ability to participate in travel to training activities. We would have had several attend this year's conference otherwise.

The last SASFAA conference I attended I really enjoyed, but my college is cutting the budget this year and will not allow me to participate anytime soon.

We have used new staff training, and that has been helpful.

**Do you believe that SASFAA membership has value even if you do not attend the conference? \***

387 Yes

35 No

Why or why not? (214 responses)

No - All valuable information is also forwarded to NCASFAA members.

No - Because the same information, or better, can usually be found on the Finaid-L listserve, or from looking it up in the handbook.

No - I can get what I need from NASFAA

No - I do not use any tools except the info that I get at the conferences

No - I obtain as much information and more networking opportunities from my state organization.

No - If I don't attend the conference, there doesn't seem to be a reason to join. I have not discovered any added benefits I get by paying my membership dues versus not paying my dues.

No - IT is difficult to say. I think that there are valuable sites and the conferences are interesting to attend, but info can be sought from IFAP and similar websites. I do think however, that the conferences are also dependent on the participant putting the effort in to get more results out. Solely on the presentations at the conference, there are interest topics, but somehow, they need to be more interactive. It also depends on the knowledge and experience of the presenter. Many presenters are very knowledgeable.

No - It was discussed in our office this year that we do not receive much as a member unless we can afford to go to the conference or other training. This year with the economy the way it is and budgets having to be cut, we contemplated paying the membership again. It is very hard to get much out of the state or regional organizations unless you have the time to participate and in this industry, being short-staffed, etc. there is not much time available to put towards participating. Including participating in this survey since our school like others, has been off the past two weeks and classes begin next week. We have been inundated with calls, questions, etc from students, parents and other offices. I worked until 10pm last night and expect to do the same tonight, but then am asked to complete a survey "before we get too deep into our work again". Sending the survey in the fall (October) may have been a better option as most everyone I know is completely overwhelmed right now. This past fall some of the guarantors offered some of the best training on the new regulations and I look forward to more webinars from them this spring. I think that is the best kind of help that can be offered to financial aid administrators in this membership, but unfortunately it is not something that can be easily offered by a state or regional organization ... unless it is offered at their conference. Webinars take time to develop and offer. Other than that there is a newsletter that is created by SASFAA however there is no time to read it. And personally, I just pick up the phone and call another school if I need to network or ask how they are processing. I look up the office information on the school's website, thus I don't really have a need to use the SASFAA membership directory.

No - I've only been a SASFAA member since May when I attended the New Aid Officers Workshop. I'm not sure what SASFAA can offer me yet, but I really enjoyed the NAOW.

No - Membership has not enhanced my knowledge of SFA.

No - Most FA information comes via NASFFA

No - Only see the value in conferences.

No - Simply put, I would not miss it, if it went away.

No - The dues amount is modest so I don't mind paying it, but really, you don't get anything for the money if you don't go to the conference or summer workshop.

No - The most valuable aspect of SASFAA is the quality of the training offered at the conference. The listserv is used to announce job openings primarily and I consider that junk email. I don't make a connection between SASFAA and national issues. I get daily updates from NASFAA and my state organization provides updates concerning state issues. SASFAA is great at training but that is the extent of its value.
No - training during the year is geared towards upper administration or new-comers. Nothing is geared towards those in the middle unless they are a manager of staff.
No - Very little value for day to day operations.
No - You get more out of NASFAA and the state association.
Yes - 1. My membership increases the SASFAA size, providing a greater representation to persons and other organizations. 2. The information SASFAA collects and disseminates is certainly useful.
Yes - A source of current information.
Yes - Access to information and colleagues.
Yes - access to others within the field
Yes - Although the attendance at the conference is the most beneficial, there are other benefits such as the mgmt institute and leadership.
Yes - always get updates on new regulations and things of importance to help get our jobs done in financial aid
Yes - Am not sure there is really a need for regional associations any longer, be it SASFAA or any of the other 5 regional associations due to the current economic conditions and the changes to the financial aid industry. That being said, SASFAA has always done an outstanding job of providing valuable programs and services to its members and in my opinion is the best regional financial aid association in existence. I've had experience in 3 regions now so I feel I have some basis for comparison.
Yes - Because of the offerings we receive from SASFAA (newsletter, etc.) and the networking.
Yes - Because the conference sessions are made available on line and are very useful in helping to train staff and organize office procedures.
Yes - Because you get a chance to network and that helps to enhance your shop
Yes - Because you have access to additional resources
Yes - Because your information helps keep us informed.
Yes - Being a part of the list service is a benefit and other notifications that is received.
Yes - Being included on the listserv and receiving the newsletters helps keep me informed. I also appreciate the networking opportunities.
Yes - Being on the SASFAA list serve when you are unable to attend conferences out of state, due to bugeting and the economy, it is very helpful and I appreciate being kept in touch with ever changes financial aid issues.
Yes - Benefits, other than conference, include listserv and newsletter.
Yes - But it is unlikely that I would have paid dues if not attending
Yes - But regional and state association memberships are not as valuable as they once were.
Yes - But very little. Most all of the information that I receive from SASFAA is obtained at the conference.
Yes - by receiving updates, I stay informed
Yes - collaboration with colleagues, professional development activities

Yes - Communication with others
Yes - contacts throughout the year even if you're not at conference; information dissemination throughout the year
Yes - Due to other services provided through SASFAA.
Yes - Education and information
Yes - FA Info is beneficial.
Yes - Find value in the newsletter
Yes - For networking and being able to get ideas from others
Yes - For training and profesional development workshops - New Aid and Mid-Level
Yes - Getting the trade association updates are valuable.
Yes - Great opportunity to network and share procedures and individual school policies with colleagues. As well as a means to meet wonderful people.
Yes - great summer NAOW
Yes - Greater scope than at the state level, but not as intense or possibly intimidating as NASFAA can be (especially for new FA professionals).
Yes - Helps to receive emails and updates
Yes - Helps with staying in the loop of happenings regarding Financial Aid.
Yes - Helps you stay in the loop with your colleagues.
Yes - I am able to access the session handouts on-line and use the membership directory to contact other FA staff for help.
Yes - I appreciate getting the listserv emails, using the Member Search function on the website, and getting the newsletter. Membership keeps me in touch with other FA professionals.
Yes - I appreciate the information provided by other members, particularly being new to Financial Aid.
Yes - I assume that it does I just haven't had the opportunity to really find out.
Yes - I believe SASFAA (and other regional associations) could improve its positioning as a liaison between the states and NASFAA. This has broken down over the years; there is great strength in being a part of the greater whole. I believe a downfall of the regions and states is losing sight of our relationship to NASFAA.
Yes - I benefit simply from the information received from the SASFAA listserve.
Yes - I can stay informed on issues that I may not otherwise be aware of without being notified by the SASFAA listserv.
Yes - I can still stay connected by the News letters and up to date information that is available on the website.
Yes - I don't really use it's services, but I am sure is a resource for others.
Yes - I find the other training opportunities useful. In addition it is an excellent networking and advocacy organization
Yes - I joined SASFAA when I went to the New Financial Aid Officer Workshop at Bellarmine University this past summer. It was very helpful. I learned a lot and was able to network with some great people who have helped me tremendously.
Yes - I like being on the listserv because of industry updates and other relevant information.
Yes - I like getting different views and opinions from all the members.
Yes - I receive great information through your organization

Yes - I think that SASFAA has been on the cutting edge - when facing some of the issues these past couple of years. Looking for solutions and communicating well with the membership
Yes - important resources available online
Yes - Important to profession to provide training opportunities, even if I'm not directly benefitting from them
Yes - In SASFAA, there are several different states with very different ways of processing student aid to students. SASFAA gives a place for different ways of processing to be discussed.
Yes - info on the listserv and in the newsletter
Yes - Information available.
Yes - information exchange via list serv and newsletters alone are worth the \$25.
Yes - Information sent on the listserve is helpful
Yes - Information shared among the professionals is an invaluable asset.
Yes - Information shared through the listserv and the newsletter
Yes - Information Sharing
Yes - Information sharing at the regional level.
Yes - information updates through the web
Yes - Informative in terms of federal updates and other financial aid issues
Yes - Interaction with other financial aid professionals.
Yes - Invaluable Federal info!
Yes - It allows for us to obtain information from our region in regards to vacancies and also allows us to obtain information when a question is asked on the email system. Workshops are great such as the SASFAA New Aid Officers.
Yes - It given you a network of colleagues to reference.
Yes - it gives a an oppotunity to network and meet other advisors and administrators from other school and ask questions on how they respond to ceratin situations.
Yes - It is a great way for peers to communicate and assist each other.
Yes - It is always nice to receive important information about new and upcoming regs, share information between institutions and peers.
Yes - It keeps us informed of what's going on around our region.
Yes - It offers other areas of professional development for the members
Yes - It provides helpful training programs and networking opportunities.
Yes - Its good to have individuals you can turn to with questions. Its good to network.
Yes - job postings and occasional legislative updates
Yes - Keep up
Yes - Keep updated on legislative issues and training opportunities that are available outside the annual conference.
Yes - Keeps me informed of latest information in territory and region I work in.
Yes - Keeps me involved in the Financial Aid Network in my region. allows me to stay abreast of the news and issues regarding all facets of financial aid, not just loans...
Yes - keeps we up on new Regs and gives me sources to answer questions or request help if need
Yes - List serve information
Yes - listserv
Yes - listserv

Yes - Listserv, newsletter
Yes - Membership contact info. Conference, leadership opportunities, leadership development and new aid officer training.
Yes - Membership helps young professionals establish relationships, both personal and professional, that will serve them well during their years in financial aid. It provides a forum for institutions to learn from the best practices of others, especially through focused meetings and events such as the Leadership Institute. Membership gives us a regional voice with NASFAA, and helps us better understand both our mission and challenges in the face of demographic changes.
Yes - Membership supports training and professional development.
Yes - My membership still has value because of all the important and essential information provided to me through SASFAA via email or on the website.
Yes - Needs feeds, training opportunities.
Yes - Networking
Yes - Networking
Yes - Networking and development.
Yes - networking and sharing ideas with members outside my region helps gain different perspectives on new and existing practices
Yes - Networking and training opportunities
Yes - Networking- legislative updates- valuable training opportunities
Yes - Networking opportunities and being informed on what is going on within financial aid.
Yes - Networking opportunities and contact you make with colleagues that you can call on for counsel and advice.
Yes - networking with colleagues
Yes - Networking with colleagues - strong training program
Yes - Networking with financial aid community and obtaining much needed updates.
Yes - Networking with peers. DOE updates.
Yes - Networking!
Yes - Networking. Advocacy.
Yes - New Aid Officer's Workshop
Yes - newsletters, networking, listserv
Yes - online resources and communications
Yes - Other events offered outside of the conference (i.e. New Aid Officer's Workshop, etc.)
Yes - Other events, such as the management institute and interaction with knowledgeable colleagues.
Yes - Other training offered and legislative initiatives.
Yes - Other training opportunities are provided by SASFAA. Communication via listserv or newsletter is helpful.
Yes - Other workshops offered during the year.

Yes - Perhaps, but minimal at present. Unless a member attends the conference or Summer New Aid Officers' Workshop or Mid-level Workshop (Leadership Symposium), etc., SASFAA's role does not appear evident other than providing a roundtable discussion opportunity for state presidents. Although I know that SASFAA has representation on the NASFAA board, I believe that even NASFAA's role is becoming less and less evident in assisting aid administrators with their roles and professional development.
Yes - professional growth and educational
Yes - Professional affiliation-newsletter-list serve info-legislative/regulatory updates
Yes - Professional Contacts, networking, and employment information.
Yes - provides an opportunity to meet and brain-storm with others in the field.
Yes - Provides representation at the national level
Yes - Provides updates on current policies as well as other member institutions.
Yes - Regular email updates are helpful as well as other opportunities for professional development outside of the conference.
Yes - Resources available on website.
Yes - SASFAA affords members to network and receive current updates to keep institutions in compliance.
Yes - SASFAA and its leaders continue to provide support, training, and resources to assist the many members across the southern area. Our job is difficult but would truly be much more so without our professional organizations.
Yes - SASFAA gives so much to our Financial Aid community. The sessions and networking are so helpful and needed. Our industry is changing and we need to support our institutions and our students.
Yes - SASFAA is another resource of information that is available to financial aid administrators. We can use all the support we can get!
Yes - SASFAA is our Professional Organization that represents and supports our profession. Professionals need professionals.
Yes - SASFAA Listserve and other training opportunities
Yes - SASFAA membership is valued because of networking and policies and procedures updates.
Yes - SASFAA provides a network of FAA that can share knowledge and experiences.
Yes - SASFAA sends out good information and newsletters throughout the year. It's also good for networking.
Yes - SASFAA speaks on behalf of aid administrators in the southern region. It is important to have representation to the NASFAA level too which can impact legislation and things like that.
Yes - Sharing ideas and finding resolutions among your peers.
Yes - The ability to network with individuals outside the state offering different perspectives
Yes - The ability to network with my colleagues is one of the main reasons I benefit from SASFAA. I gain a great deal of insight and knowledge from these relationships that helps me be a better aid officer.
Yes - The ability to share information with your peers and learn new things is great.
Yes - The conference and workshops provide the most benefit. Not sure of the benefits otherwise unless you serve in a leadership capacity.

Yes - The conference is amazing! Great way to educate and be informed on current financial aid trends.
Yes - The conference is the primary reason I belong but I believe the training offered by SASFAA is important
Yes - The conferences provide the opportunity to network with other institutions in the southern states, not just NC.
Yes - The connection with other Financial Aid personnel
Yes - The email feedback and contacts have been immensely helpful to me as a new administrator in N.C. I'm proud to be a part of SASFAA - keep up the good work!!
Yes - The email forums/networking with other aid officers
Yes - The emails that are sent through the list serv are very helpful. They keep us aware of changes in staff and other issues within SASFAA.
Yes - The existence of regional associations support and uphold the state associations, and provide the backing for the national association. What more, there is so much information in our field that such associations are crucial for the dissemination and proper discussion and interpretation of such information. SASFAA provides a network of professionals at a regional level, who have a greater perspective than their own state issues, but are more approachable than the national association leaders.
Yes - The information and communication within the association keeps us informed of the news in the industry as well as keeping members connected.
Yes - The information and family feel from the Listserv are hard to find anywhere else!
Yes - The information circulated through the financial aid community is very useful. The updates and job postings are a great way to stay informed and network for employment.
Yes - The information I receive from SASFAA has been beneficial in keeping my office compliant in the administration of aid.
Yes - The information is invaluable.
Yes - The information made available to it's members on current legislature.
Yes - The information shared on the list serve is valuable.
Yes - The information that I receive from SASFAA is valuable and the connection with fellow members is equally valuable.
Yes - The list serve is beneficial and the training offered through workshops such as New Aid Officer training is important. Not all staff can attend the conferences but they are able to attend workshops.
Yes - the listserv is valuable.
Yes - The listserv notifications from other SASFAA members provide valuable information.
Yes - The listserv and newsletters are extremely beneficial. Also, the connection to additional training opportunities like Mgt Inst and Leadership Symposium have been helpful in professional development.
Yes - The membership directory and valuable info provided on the website.
Yes - The membership is well diversified. There are many wonderful colleagues out there. There's a lot of experience and knowledge affiliated with SASFAA.
Yes - The membership provides a sense of commonality amongst your colleagues and still provides an opportunity for exchange.
Yes - The networking and news are valuable to understand the current issues and challenges facing aid professionals.



Yes - The networking with colleagues throughout the southeast.
Yes - the networking with colleagues, the other training opportunities available
Yes - The newsletters and updates provide easy reading to keep you informed of happenings in the financial aid arena even if you do not attend the conferences.
Yes - the professional network is well worth the price.
Yes - The professional updates and training
Yes - The relationships I have formed with other FA professionals through our mutual association with SASFAA has been invaluable to me both personally and professionally.
Yes - The SASFAA membership has value because it helps the financial aid administrator find better ways to do things, be more effective, and how to provide the best customer service to your students. Even if you do not attend the conference, you still are informed about any changes to the policies and procedures for the Title IV programs through e-mails and by searching the SASFAA website. You can also find information on revisions to the FAFSA process, and program compliance. SASFAA conferences provides an abundance of information that will help you achieve your goals.
Yes - The training, updates and opportunities to discuss what others are doing are invaluable.
Yes - The week-long summer training was a difficult experience, but invaluable in my work.
Yes - There are other training/professional opportunities available.
Yes - There are professional development opportunities outside of the conference (such as leadership symposium or new aid officers workshop) that are valuable.
Yes - There is a lot of helpful information on the website and you can always check it out regardless if you go to the conference or not.
Yes - There is value in the relationships established and the ability to network with colleagues when I have a situation, etc.
Yes - This is a profession that needs as many resources for information as possible.
Yes - This organization gives FA professionals an opportunity to discuss the issues with Financial Aid as a whole and as well issues we have on our own individual campuses.
Yes - This will be my first year attending SASFAA instead of other conferences. I am interested in expanding my professional network with other seasoned aid administrators
Yes - Those that do attend bring back valuable and important information
Yes - Timely information is always provided that is not always available elsewhere. Networking with colleagues is invaluable.
Yes - To receive updates and notices from the organization is a big help. I have been a paid member for 6 years. This will be my 1st time coming to the conference. I always pay membership fees to stay informed as to what is happening in the industry.
Yes - To stay abreast and current of financial information, careers, news in regions outside of North Carolina.
Yes - Training opportunities....
Yes - Updated information is provided without attending the conference.
Yes - Updated information provided to our profession.
Yes - Updates from the region.
Yes - Website and Listserv as well as other SASFAA professional development opportunities.

Yes - Website/list serv
Yes - While the conference is a major benefit, the listserv and other members offer valuable information and feedback. Also the representation that SASFAA has on the NASFAA board ensures our interests from the region are heard at a national legislative level.
Yes - Workshops
Yes - but there needs to be more ROI
Yes - it has some value in areas such as access to info. not shared to the general public(member directory, listserv, etc), voting rights, etc.
Yes - however it's questionable what role will SASFAA play - training advisory. Opportunities for travel and participate are lessened all the time and if NASFAA or DoE increase training, is SASFAA necessary?
Yes - You are able to access important information and be informed of important issues in our regions.
Yes - you receive valuable information through the SASFAA listserve
Yes - You still can network with your peers and gain valuable information
Yes - You still have access to the listserv, the membership directory (an important network of people), newsletter, and can get all of the conference presentations on-line.
Yes - You still have the opportunity to network with your colleagues about new changes/updates. Usually most schools will send someone to represent the institution.

## ABOUT SASFAA PROGRAMS

### Which of the following SASFAA programs will you attend during 2008-09?

21	SASFAA Leadership Symposium	32	SASFAA Management Institute
214	SASFAA Annual Conference	16	SASFAA New Aid Officers Workshop

### Please rate the quality of the programs listed below that you have attended previously.

	Excellent	Above Average	Average	Below Average	Poor	Never Attended
SASFAA Leadership Symposium	42	13	3	0	0	218
SASFAA Management Institute	42	16	5	0	0	216
SASFAA Annual Conference	159	120	32	0	0	58
SASFAA Mid-Level Managers Institute	16	21	7	0	0	230
SASFAA New Aid Officers Workshop	136	35	13	0	0	146

## ABOUT SASFAA FEES

### The current conference fee is \$225. Is this fee:

79	Too high	290	About right
13	Low – but please leave it as is	17	Low - it would be OK to raise it in the future if needed

### The current membership fee is \$25, and this amount has not been changed in many years. Is this fee:

5	Too high	206	About right
72	Low – but please leave it as is	133	Low - it would be OK to raise it in the future if needed

### If the membership fee is raised in the next year or so (a decision that would need to be voted on by the membership), what would be the maximum amount you would recommend?

11	\$25	65	\$30
74	\$35	52	\$40
7	\$45	100	\$50
13	\$75	7	\$100
4	\$200+		

### Who pays for your membership fee?

68	I pay personally to join SASFAA	345	My organization pays for the SASFAA membership (or reimburses me)
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**As SASFAA strives for financial stability in the future, what is your general opinion of fees being raised?**

152	Fees should not be raised since many organizations have cut budgets, including travel to attend professional activities	26	Fees should not be raised because SASFAA can tap its reserves to support itself right now
134	Fees can be raised if needed since vendor support is declining	54	Fees can be raised since they are already low
Other: (58 responses)			

A combination of raising fees and tapping reserves should be considered.
a combination of several - increase fees, lower costs of events, and draw down reserves
Alright to raise membership fee, but do not raise to high.
Before raising fees, we must consider the effects of members institutions ability to pay and the effects it will have on members ability to attend the conference.
conference needs to be self-supporting. membership fees should pay enough to cover ATAC, some board expenses and other events going on. All events should be self-supporting. Vendor dollars and membership should help pay the other things that need to be completed during the year.
Conference registration fee should cover, at a minimum, all meal costs - Membership fee is very low IMO
Consider slight increase in fees and tightening of the budget where possible - committees meet via conference call/webinar (there is still a charge, but it is less than travel for committee members) - do all committee chairs really need to attend all board meetings? Consider having leadership institute in conjunction with annual meeting (I know that there are other pre-conferences & new aid, but it could save money) - Keep annual conference costs as low as possible (most people are not attending to hear a "high powered" keynote speaker, they are there for the concurrent sessions & federal information). Continue to invest in training and professional development, as I believe those are our key responsibilities.
Fees (especially for the conference) should be based upon what we get for the fee. For example, if it's too expensive to provide food, don't provide it. That shouldn't be the reason to increase the fee.
Fees are low and have not been raised for some time. In the current environment SASFAA needs to increase income and they need to provide add-value to training efforts. SASFAA can consider online training such as webinars and consider partnering with NASFAA for online training: Learnstudentaid.org (VASFAA currently is doing so, may be worth exploring) & decentralized training that could piggyback the annual conference to utilize meeting space for current hotel contracts. You could consider additional pre-conference registration fee to cover costs of training materials and food/beverage.
Fees are too low currently for a viable association program with declining vendor support. A maximum institutional fee might be considered since everything today is electronic and extra members do not cost a significant amt of money.
Fees can be raised but keep at a minimum because of budget cuts.
fees can be raised for the last two reasons given
Fees could be raised because of both the vendor support declining and that they are lower than most professional organizations but need to keep in mind that most schools (especially state funded institutions) are making drastic cuts at this time.
Fees could be raised for non-school members.
Fees do not need to be raised significantly if SASFAA finds other means to conduct business--i.e., webinars, videocams, teleconferencing. This will have an immediate and significant effect on costs.

Fees need to be raised to cover the cost of the individual cost of breaks, meals, etc. The registration fee needs to be the total cost of an individual's meal expenses.
fees need to be raised, but there needs to be a concomitant use of SASFAA Reserves
Fees should be raised a little. The necessary increases should be split evenly between the SASFAA reserves and the membership/conference fees.
Fees should be raised but the adjustment should be minimal considering the reserves.
Fees should be raised if additional funding is needed.
Fees should be raised only as a last resort.
Fees should not be raised at this time because of how the economy is at the present. Once the economy levels off, then fees could be raised to my be \$50.00.
Fees should not be raised because I am responsible for paying my own fees. My organization will not reimburse me.
Fees should not be raised this year due to the declining economy. Hopefully the economy will be better next year and institutions will have more money.
Fees should only be raised after utilizing some of the reserve funds given the constraints on institutions' budgets.
I do not feel I have any basis to respond to the above question.
I do recognize the cost to have a conference; however, SASFAA needs to carefully evaluate where expenses can be cut, including expensive costs for board and transition meetings.
I don't think the organization should depend solely on vendor support.
I have no opinion or suggestions.
I think fees could be raised but only modestly
I think if the fee is raised....it should be kept at the lowest rate possible
I think most institutions budget for some increase over the years.
I think that if fees are increased it might be necessary to have a conference every other year....
I understand that fees often need to be raised. Particularly if the membership is dwindling. On the other side, our institutions are cutting back which affects
I would agree with raising the membership fee, but not the conference fee.
If absolutely necessary in order to make ends meet.
If dues are raised I would have to reconsider membership since our budgets are cut and I would not be getting anything out of SASFAA membership
If fees are raised I would have to reconsider being a member since I pay the dues myself and the college has cut travel and I will not be able to attend conferences in the future.
If fees are raised, it may limit the number of members from each school. No longer would ever member of my office be a member of SASFAA.
If individual fees are raised, I, for one, would not be able to continue membership.
It depends on which fees. The membership fee is too low, so raising it a bit makes sense to me. The conference fee is high enough. I understand it does not cover all of an individual's expenses to attend the conference, but if it raised too much I fear it will reach the point where people will stop coming and start allocating those funds in their budget towards other training events.
It may be that institutions will need to reduce the number of members it supports. Staff may need to return to their offices to education others as a result of their SASFAA experience. My perception is that our profession minimized our financial support in comparison to other professions because of lender support. The reality is that we, like any other profession, need to have the financial support of our institutions to behave professionally. Compare our costs to SACUBO and NACUBO; it is an eye-opener.

It's my opinion that a modest fee raise on a regular basis, will allow SASFAA to create a more solid financial base, and give the org. more freedom in offering trainings, etc.
Membership fees should not be raised as the vast majority of SASFAA's benefits are in its conference, not membership. Greater fees will would only be waranted if SASFAA offered more features for its members.
N/A
Raises might be necessary but you would need to demonstrate significant cost-cutting as well. Less lavish conferences, especially entertainment, much reduced board meeting expenses, fewer gifts to committees, etc.
Registration fees should not be raised beyond \$225 due to budget cuts at most institutions and we would like to send more than one staff to the conference each year.
Reserves should never be tapped to cover the low cost of membership fees.
SASFAA can tap its reserves and should wait another year to determine how the economy progresses.
The fee should be at the level that covers the cost of the attendee. This could mean meals would not be provided or the conference is a fee and meals could be charged on a per meal basis.
The SASFAA board should rely on this members' expertise in finance and determine if a fee increase is necessary to sustain the organization.
There should be an effort to contain the costs associated with the conference (i.e. meals, location and length) and,then, to have fees that support the costs of the conference.
To raise the fees would limit many schools and attendance could suffer.
tough times for SASFAA - loss of vendor support and current economic climate universities find themselves in
What about more tele or web classes?
When I was SASFAA president we had not yet accumulated a reserve and we worked on a shoe-string budget and got lots of volunteers to share rooms and travel together to get things done/
With declining vendor support, it would be appropriate for fees to rise moderately. However, it needs to be carefully looked at as significant budget cuts in serveral states have severely limited the travel and participation levels for schools in those states.
You can raise fees if you must, but please keep them as low as possible. Our state will not fund individual memberships.

Do you have suggestions for how SASFAA can increase revenue? Please explain (67 responses)

Although our company pays the fees to attend SASFAA, raising the fees would not prevent us from attending unless a substantial increase occured. Stabilization of the organization is important in these trying times as continued education and discussions pertaining to the Fin Aid industry are just as important.
Apply to some foundations for funding for access to education.
Are there any past FA members that could set up a foundation or endowment from which the association could draw?
At this moment with companies down sizing and the economy in devastion, I would suggest budgeting. When ever possible use electronics rather than paper. Require everyone to print there own agenda. We just have to budget. Do more with less.
Can raffles be done like we do for the charities?
Change membership to insitutional and include X number of staff in the fee.

Charge a minimal fee for on-line training which can be developed along with the other training on-site for Mid-level managers and new aid officers
Charge lenders and guarantors a different membership fee than schools.
Contact insurance, financial planner, 401K companies like TIAA-CREF, Fidelity, Vanguard and have them advertise on web site and have a booth at the conference
Continue to explore asking other vendors (other than lenders and guarantors) for sponsorship support. May want to consider exploring grant opportunities.
do a slight raise on membership due to \$30/year
Don't currently have any suggestions
Explore attracting vendors who have not traditionally been solicited.
First thing needed to see how much money is needed for revenues and why, we have seen at our state level, that cutting back some on expenses has helped balance our budget and still provide great conferences and have some reserves on hand
Fund raisers?
Fund raisers-sell SASFAA t-shirts, other paraphernalia; SASFAA fundraisers thru state associations (prize to state raising most \$)...
Fundraisers held during the conferences in the evening.
Have SASFAA t-shirts or polo shirts - have a SASFAA raffle for a prize
have vendors pay for advertising on the website in addition to their exhibit fee
Hold fundraisers
I am not sure about increasing revenue as we are in a field where we should be offering services for free, thus it is difficult to increase revenue. Would it be possible to solicit donations from companies or individuals by letting people know who we are and what we do ... and possibly promising a portion of their donation to be a scholarship for a student? I don't know how legal that would be but I just thought I would throw it out there. It seems that community service organizations solicit donations for their organizations.
I think raising fees by minimal amount would be understood and accepted by most members given current financial situations everyone is aware of.
I think SASFAA could raise membership fees and conference fees a bit - but - just a bit - because these are tough times for all.
i wish our organization like others i belong to would say, we want to raise X dollars to achieve Y. it seems we just raise money in order to fund conferences. i would like to see us raising money to assist with lobbying for certain financial aid causes, creating a scholarship fund, creating research awards, etc.
If attendees are covering their costs, there should be no need to increase revenue.
In the current environment, probably the only way to increase revenue is a combination of increasing fees and by reducing the SASFAA costs on conferences and workshops.
Include vendors not related to loan industry (software, consultants, etc.)
Increase membership
Increase membership
Increase the membership fee slightly.
Increase vendor support
Intellectual property.
invite non-financial aid vendors to exhibit
It is extremely tough times for everyone. SASFAA needs to be careful not to raise prices so much that less people attend events and/or continue membership.
Look at how other similar organizations (admissions, registrar, business officers) fund training and conferences. Would it be possible to tap some of the vendor relationships they have?

Look to foundations for support of training programs. Establish your own foundation to solicit donations to defray future costs. Set it up as an institutional endowment style program and spend the interest each year.
Make SASFAA a broader organization highlighting how enrollment managers, admissions office and bursars are working together.
Make the annual meeting so valuable to schools that it is a 'must' for them professionally. Look at the attendance at FSA meetings. Schools flock to them and it isn't for free stuff. They go because they get information that they can't get any where else. Some SASFAA members treat the conference like a free vacation. They go and then don't attend sessions. So, be careful about having the conference in resort areas. Sometimes the venues are too tempting for people and they don't attend the meetings.
Market to the presidents of institutions on the validity of membership.
Membership dues from lenders, guarantors, secondary markets, etc. could be raised slightly and membership from schools kept lower in order to raise additional funding. Some non-school members are attending conferences without exhibiting in order to skirt higher exhibit costs. Charge more for non-school members who are NOT exhibiting at the conference to attend -- or, conversely, increase conference fees across the board and offer discount to SASFAA school members attending and to non-school members who are exhibiting at the conference.
More outreach to vendors at conferences or more opportunities to vend.
My personal opinion is that NASFAA should be stepping up more to support both regional and state organizations. We pay a good deal to be members of NASFAA and although we benefit from being members, I am not sure we get our money's worth for the amount we are charged to be members.
No
No
No.
offer other vendors opportunities i.e. automation system providers, legal , consulting but at lower rates than lenders could afford. Check out related association vendors like NACUBO and other not higher ed, but used. Survey members on other types of vendors they use, i.e. office supplies, services like staff training, shredding, etc.
Open the conference up to more vendors similar to Overture, etc. The technical companies should also be allowed time for a session to discuss their product offerings.
Pancake suppers?
Perhaps a raffle
Raise fees; drives (e.g. book drives, etc.), contests of some kind that might incorporate Financial Aid knowledge...
Raising fees is the obvious answer - Foundation support is a possibility - Perhaps a discussion should be started with ED about direct financial support from ED
Revenue can be increased in many different ways.....increasing fees, raffles, fund raising events such as golf tournaments in each state(potentially at schools who have their own courses), or any number of other things. Feel free to contact me at jsmith@johnmarshall.edu if you need help or want more ideas. One would be to contact foundations or other areas that give grants for revenue(donations) as well as membership since learning about financial aid could only benefit them.
SASFAA can have creative fundraisers, continue to have workshops, conferences.
Seek other vendor support outside the traditional vendors, such as software vendors, scholarship vendors, etc.
Sell advertising space on website.
Since lender support is declining, SASFAA should look for other potential sponsors - software companies, consulting firms, CPAs (auditors) - who provide services to aid administrators.
STOP PAYING FOR SO MUCH TRAVEL
switch from individual to school based membership; charge fees in line with school size.



The conference fees should be raised instead of membership dues. It is easier to justify an increase in conference fees than a membership due that doesn't have a tangible benefit.
Think out the box, begin to tap into other forms of resources that maybe out there. Ex: vendors schools use to purchase supplies, computers, copiers etc. you will be surprise what resources maybe available.
This is tough. You will need to find compelling services that people are willing to buy and that earn more than it costs to produce. I'm not sure in a volunteer organization that this is likely.
Unfortunately, it seems the pendulum has swung from lenders competing to sponsor events to lenders not being willing to sponsor anything. What's happening in other associations? SACAC, NACAC, SACRAO, CACRAO, etc.
Unfortunately, the members and their schools have gotten used to having services given to them, or priced below what the market would bear. To try to raise prices or ask for payment for "freebies" in the current environment would be counterproductive.
Vendors or sponsors outside of the financial aid industry...national corporate sponsors, Dell, Coca Cola, Software providersl, etc.
Well would could ask for some of that bailout money (just kidding), maybe a fundraiser.
Yes. I think SASFAA should be seeking a grant from the Lumina Foundation. Ours are unique challenges, given the projected growth in the number of high school students over the next two decades. We have to find capacity for all of these students, in lean times.
You could always raise the membership fee for new members.

Do you have suggestions for how SASFAA can decrease expenses? Please explain. (79 responses)

1)Reduce board size, number of meetings. Hold conference calls when possible. 2) Reduce travel expenses. Why should the SASFAA pres or pres elect go to every state meeting if there is someone else in the state on the Board?
Yes, it does not need be as long as it is and we could cut out the "fluff"
YES, CUT BACK ON SOME OVERHEAD
While the "Don" is a wonderful experience, it is very expensive. Require that committee meetings be teleconferences whenever possible
We need to get back to basics - everything does not have to be so elaborate.
We may need to move the conference to large universities who have conference facilities that can meet our needs, especially now as we expect attendance to be lower due to budget cuts.
Visitation programs and presidential travel need to be re-examined, especially with technological alternatives that exist.
Video or telephone conferencing for committee/board meetings. Not having all committee chairs at every meeting of the SASFAA Board.
video conferences for conference planning and workshop planning rather than expense fees for travel for committee members
utilize webinars for training- create a Peer Support Network (review the one on www.scasfaa.org this is a great method for sharing knowledge.
utilize members in the organization. Many times I have volunteered to participate in an event but was never been called.
Unless paid for by vendors (that is their decision as to what to serve and cost), meals paid for by SASFAA don't have to be so fancy - soup/salad and sandwich is great for lunch meals.
Trim a day off the conference.
The supply of food and beverages(coffee) during the conference may have to be reduced.

The Leadership Symposium and Management Institute at Grove Park Inn was wonderful, but, I am sure it could have been held at a more affordable facility.
Shorten conference days and maybe centralize location of conference
shorten conference a day. don't have conference committee get together as much. board should consider cutting one of the meetings.
See above.
Scale back conference, or make it "pay as you go". Membership based organizations who have no sponsor support cannot continue to subsidize attendance at regional conferences without sponsorships and advertising. Look to similar organizations (SACRAO?) to share facilities and programs/speakers.
re-evaluation of the location and way in which annual conferences and training are held. Are there less costly facilities on a college campus that could be used with lower cost hotels surrounding it? Food costs? 1 banquet/1 business lunch? Just suggestions off the top of the head... But ultimately a re-evaluation of the conferences/training locations may be needed...
Reduce Travel
Reduce reliance on top brand hotels. Attendance should be restricted to about 75% of last year's amount.
Reduce annual meeting to one and one-half to two days.
Quit holding board meetings at expensive resorts
Provide fewer perks (such as meals and snacks at breaks) at conferences. I attended last year's conference and was amazed when the SASFAA president mentioned the cost for various food and beverage items during one of her speeches. It's an absurd amount of money to spend, even when money is plentiful.
Possibly limit the activities to the one conference and the New Aid Officer's training. Work on posting more information via the website if it is less expensive. Hold conferences at less expensive places, possibly at schools that have conference centers or when students are not in sessions and don't contract with hotels that charge the organization for meals. As I have said to many ... the FSA conference is the best conference and there is nothing offered but training. People find their own hotels to cut costs and their own food yet it is a wonderful conference. Why can't state and regional organizations offer the same?
Perhaps the participants could provide their own meals. If we are in an area that provides a number of restaurants and eateries, that would cut down on the expenses a great deal. Also, perhaps we could eliminate paid guest speakers.
Perhaps don't have continental breakfast each day. Only have breakfast the last day of the business meeting.
only provide lunch at the business meeting and the rest of the lunches as on your own; have all the evenings as on your own since it costs more for dinner and evening events; look at hotels that offer competitive pricing for food; look at hotels that are not expensive resort destinations; do not offer brownies/cookies/ice cream at afternoon break. Who needs more food right after lunch, anyway. Only offer sodas/coffee at afternoon break.
Only drive Hondas:-) Perhaps, print-your-own presentations?
On line training
not have conferences at the most expensive places
Nope
No.
Move the SASFAA Transition Retreat from the Don Cesar to a less expensive site.

More moderate locations for the annual conference.
meet in less expensive loacations
lower price of meals, less meals, lesser hotels, centralized cities so all have less travel
look for less expenses hotels and cities to hold meetings and conferences
Location - I am more interested in the substance and material provided in the conference versus the location it is held.
Limit meal functions at the conference!
Less paid travel or lower conference costs are the only options here.
Its difficult for me to answer this questions since I am not familiar with SASFAA budget and expenses.
Increased use of conference calls, virtual meetings, rather than group travel to one location. I know that using these methods has increased in recent years.
Increase membership
I'm not sure how many of the committees currently meet via conference call, but that is one way to save travel and lunch expenses from committee budgets.
If costs are an issue in the attempt to avoid raising the registration fee, perhaps a review of the "necessary" expenses for a conference can be looked at, i.e., what number/type of meals are necessary? What location is necessary, i.e., hotel "conference" resort or less elaborate hotel and perhaps a college/university campus for sessions/meetings? True, we all like the "resort" experience, but is that something that SASFAA (and members' institutions) can sustain in the current environment?
Identify core values -- to me it's training and professional development.
i think we over do it at these conferences. why don't we look at having our conference at a certain school, if we are going to spend money on a conference, let's support our schools
I question why the Leadership Symposium was held this year. It is obvious that our revenues are declining or are about to. We reallly need to think about the value of things.
I hope it is not canceling the SASFAA Leadership Symposium - it was great. I wish more people would take advantage of it. Maybe if you put a short video on the SASFAA website about what membership means to real financial aid people - they would really see - why it is so meaningful.
I don't know how you spend the funds so I can not tell you how to decrease expenses with out knowledge of where and how you spend your funds.
I am not familiar with SASFAA's budget, so it is difficult to suggest ways to decrease expenses.
I am not aware enough to comment.
Hold conferences in convention centers or on college campuses vs expensive hotels. Make attendees responsible for their own transportation to and from events. Go back to the basics of how we were when our organization started and work from there. The fluff was added in recent years. Keep it simple. We are in an industry full of speakers, entertainers, and organizers. Pull from our talents. We attend these conferences for the people and the networking, not for a dinner and a show.
Have more on-line sessions
Have conferences in State Parks or less expensive venues.
Food and beverages at a conference kills the budget. If there is a way to reduce those then conference expenses can decreased dramatically. This is a contractual issue with the hotels.
Fewer in-person meetings, but replaced with conference calls, etc.
Examine other conference venues
Everything aspect should be reviewed
Eliminate the sit down meals. The FSA conference has a continental breakfast and break snacks.

Eliminate the New Aid Officers workshops because most states already have these programs through their individual financial aid associations.
Eliminate the banquets- site-selection is real important - try to have it at a conference center.
eliminate entertainment after banquet
Don't pay for alcohol for meetings. Don't allow convention hotels to rip us off for 6.00 bottles of water and soda. This a professional association - don't pay for a nightclub atmosphere - engage local professionals who are willing to provide creative educational entertainment for no more than a nominal fee.
Cut out some of the provided meals (although having a banquet at the conference should remain).
Cut out all the fluff - just have the basics. It can be nice but not overdone
cut down on the expensive, fancy meals.
Cut down on the entertainment provided by the organization. We go to learn, and it's not necessary to be playing all the time. We can do that on our own.
Cut back on spending. Stop going to beaches for conferences. Stop having board meetings in FL. Teleconference for board meeting.
Cost containment of functions at the annual conference, such as entertainment, meals, location, length, etc. The Board might have its meetings in lower cost settings (for example the Don Cesar and the costs of transportation there and back as well as meals are expensive). The Board as well as committees might consider other meeting formats that do not require face to face interaction for each meeting to reduce costs.
Continue to go green . . . save on publications and printing costs and utilize technology to market (web site, email and listserv's).
Consider cheaper hotel options, cut some of the expenses associated with receptions, travel for committees, etc. Committees can meet by conference call if needed. The SASFAA president should consider whether or not it makes sense to travel to all of the state conferences to speak. It may make sense to ask someone who is already attending that state conference to represent SASFAA. Schools and vendors have had to cut back on travel and expenses, the association needs to look like they're doing their part.
Committee meetings can be held by webinar and cut hotel and travel expenses. Eliminate the transition meeting or conduct it by webinar.
Budget. Do more with less.
Better hotel rates, less meals
Barebones conferences. People will have to ween themselves off the treats and fine hotels. Drop some conference meals (yes, this does mean hotel rates will likely be higher). Significantly reduce Exec. Board expenses. We can't afford places like the Don any more and even if we could, it sends the wrong message. Cut back on length of board meetings, consider committee chair attendance only as needed or rotate them at various meetings.
Al though the meal functions and breaks are really nice, we could probably decrease our conferences at least by one meal and several smaller scale breaks and still offer the same level of conference satisfaction and the sessions that we have grown to know exemplifies SASFAA and why we encourage others to attend

**SASFAA membership has always been individual. Would you suggest that the association adopt institutional membership?**

**(177 responses)**

159 Yes      209 No

## Why or why not?

- Certainly an area for SASFAA to research; colleges and universities may have to start sharing in some of the financial support due to the decline in lender/vendor support
- I don't know if that would make much of a difference with anything for SASFAA, except it may cause a bigger distance between SASFAA and members if information is not disseminated from SASFAA to all members of an institution.
- I don't know, something to think about.
- I'm not sure. What are the advantages of adopting institutional membership. Why does NASFAA have institutional membership? I think this would be a good topic to present to the membership at the conference. Present the pros and cons and rational for each and then let the membership provide feedback. Perhaps it could be a vote or maybe it should just be made by the Board based on the feedback from the members.
- Minimize length of conference
- no opinion
- no opinion
- not sure
- only if it would help revenue
No - An added cost to the institution
No - Any and all members interesting in joining at an institution can. It would not be fair for an institution with 2 paid members to pay the same price as an institution with 12 members if the fee is going to be the same for all institutions.
No - because some of us pay our own membership dues and adopting an institutional membership will preclude us from individual memberships
No - Because the membership fee will drastically increase and many organization will not include this fee in their budget.
No - Because when you change the membership to institutional, only 1 member of an institution will be allowed to be a member.
No - Each aid officer should have equal opportunity within an institution to receive benefits.
No - Each FA officer should have a voice in the operations of a professional association. Institutional membership allows one vote per institution and directors and other staff members may have differing views that may not be represented by the "institutional voting member".
No - Especially if the fee remains so low
No - Even with institutional membership, you would still have the need for individual membership, so you may as well leave it as individual membership
No - Every department has different resources for training, etc.
No - For a small school, it will increase their burden for membership when their may only be 1-2 people in an office.
No - Generally institutional membership limits the # of persons that are included.
No - Generally means higher prices and individuals may want to join even though the institution does not.
No - Having worked in an institution in which I was the only employee in financial aid, I fear the institutional fee would be planned to replace multiple individual dues.
No - How would you determine the cost per institution? On the number of the staff "available to go" or the number that have attended in the past?
No - I believe this would keep our cost lower.
No - I can decide to pay \$25 or even \$50 out of my own pocket and be an individual member. If the membership is institutional, the decision to join may be taken out of my hands and put into the hands of my supervisor, who may not see the value of membership.
No - I do not see what difference this would make, unless SASFAA is thinking about charging a higher institutional membership fee to generate more revenue.
No - I don't have a strong opinion either way. I come from an office of 3, so individual membership fees do not create a problem for us.
No - I don't think my institution will pay a SASFAA member since the NASFAA membership is sky high.
No - I fear that some institutions would choose not to join SASFAA to pay a higher membership fee.
No - I fear the cost would be too high.

No - I feel may individuals pay their own fee and can participate where the university would not pay another fee.
No - I like membership being individual.
No - I think by keeping it as an individual membership gives the opportunity to decide whether or not a person will or will not participate. Institutional membership forces everyone to participate.
No - I think individual membership keeps individual more directly involved.
No - I think it's best the individual adopt membership, because the institutional membership wouldn't be as meaningful as the individual.
No - I think SASFAA membership should remain individualized just in case an institution does not have funds to pay membership - the individual will still be able to attend conferences.
No - I think the individual membership would result in a savings for my college. Probably only those in the office attending the conference would obtain membership.
No - I would not suggest an institutional membership because there would be quite a bit of duplication with NASFAA who currently has institutional membership.
No - If institutional membership is pursued, it would seem that it would be for the purpose of legitimizing a large institutional membership fee. If that is done, some institutions may not join and the former individual members may not be able to afford paying a larger institutional membership fee on their own.
No - If institutional membership was adopted, I would assume it would be increased significantly since many offices have a large staff size. The increases could be a deterrent for some institution to remain a member.
No - If it went to institutional, some institutions such as mine where I am the only person in the aid office would be penalized. It should remain on an individual basis so that the number of members per school determine the cost.
No - I'm afraid schools just wouldn't pay it if it were institutional.
No - I'm guessing that no matter what the institutional rate is set at, some schools would be paying less than current and others would pay more than current. The per-person membership fee seems the fairest to me regarding school size.
No - I'm not sure how you would keep the directory current. I do think it might be helpful for some institutions since they could have all of their staff on the listserv, etc. If there is turnover, the institution wouldn't need to pay twice.
No - Indifferent
No - Individual is better.
No - Individual membership allows more freedom...
No - Individuals would not be able to be members if their institutions decided not to be members
No - Institutional membership - like NASFAA - creates bureaucratic issues for individuals
No - Institutional membership is usually much more expensive.
No - it depends on how it was structured
No - It is far more likely that an institution will pay for a membership to a state level association, since that is often times crucial for their state scholarships and grants. Most institutions require individuals to pay for their own membership to the regional associations. Thus, I suspect membership would go down if the institution had to foot the bill.
No - It is my experience that institutional membership does not always increase revenue.
No - It is the individuals who benefit from the membership which of course in turn benefits an institution.
No - It may become more complicated for the membership. Individual memberships are more personal in nature.
No - It might eliminate some institutions all together based on budget issues. I feel most institutions are satisfied that they have the option of choosing the individuals they feel the association benefits the most.
No - It would be difficult to come up with a reasonable rate that doesn't out-price small schools or stiff the large ones. I already question the value of my membership in NASFAA because I don't see sufficient value. If SASFAA follows the same methodology even at a much lower rate, I would likely drop SASFAA membership since there's even less value here.
No - it would be too confusing and more work.
No - It would not be fair to the smaller schools....since more than likely you would raise it more than the \$75 we pay for the 3 of us to currently be members...and we have such a small budget.
No - it would probably be too costly. NASFAA only has institutional memberships and for those schools that can't afford the institutional membership, we have no way of even being a part of NASFAA. if we did move to an institutional membership, then please leave the option open for individual memberships
No - It would still come out of my budget and not the school's in general



No - It's more confusing (see NASFAA), plus would require huge changes to election process
No - Large institutions that you might get \$500 from based on volume, you might only get \$100 if institutional membership. On the other hand if you go to inst membership, you might over price it for smaller schools.
No - Maybe something to consider, ONLY if the institution membership is tied to number of members from that institution.
No - Might be cost prohibitive for smaller institutions who have only one or two members.
No - My organization only has one member.
No - my staff is small and we rather pay individual membership than institutional membership
No - No opinion
No - no opinion
No - No, not if it is at a flat fee rate. A tiered institutional membership, however, might work.
No - Not all staff members need membership.
No - Not everyone wants to be a part of SASFAA
No - Not sure
No - Not sure institutions would support, especially in lean budget times.
No - One of the strengths of SASFAA is it's individual membership.
No - Other offices in my institution would not benefit from access to SASFAA since financial aid is not their field. They all expect me to provide input as necessary, and meanwhile focus on perfecting their own roles.
No - Others in a FA office may not have interest in belonging--more accountability as an individual membership to me.
No - Our institution pays for the membership of only a couple/few people and can afford it. If SASFAA goes to an institutional rate like NASFAA we might not be able to afford it.
No - probably not as much revenue
No - Probably would be too complicated
No - RMAFAA has this. They have experienced budget issues. Their reserves is all but depleted.
No - SASFAA could offer both options. It may be more cost effective for some institutions/agencies to pay more for a "group" membership; however, there are certainly some schools that this would not be a good option.
No - Since the fees have been so low, individual membership is better. If you increase the fees over a \$100 then it would be best to look at changing the structure to be organizational fee rather than individual.
No - Some organizations cannot afford a national and regional membership. In lean financial times I believe it would be extremely difficult to convince senior leadership to spend funds on both associations.
No - SOME ORGANIZATIONS DO NOT WANT IT AND SOME INDIVIDUALS DO
No - Some schools will look at it like NASFAA, and stop joining because they think the fee is too high.
No - Talk to RMAFAA - it does not work.
No - The cost would be too high. Maybe for institutions with more than 3 members of SASFAA
No - The institution may not pay the fee because of current budget cuts.
No - The institutional membership would allow anyone from the institution to attend the conferences however, you may decrease the revenue coming into SASFAA as well. For schools, charging a flat rate to the institutions, SASFAA would have to determine different tiers of schools(one individual in FA as opposed to 30 individuals)..
No - There is still individual benefit. The cost is still quite low for and individual even if raised to \$50, to be member of a large, regional professional organization.
No - This could be an invitation for uninterested people to be involved.
No - This one was hard it is pros and cons to institutional memberships but it may be something that needs to happen since budget cuts are so hard to deal with and your school may pay an institutional vs those workers that are not getting pay increases and thus having to opt not to pay personal memberships. This is a hard one!
No - This will decrease revenue
No - Too complicated to monitor and set pricing.
No - What value would it bring a college or university to purchase this other than supporting the existence of SASFAA? A clear value added would have to be defined before this would be needed.
No - Would probably receive less support from the institution

No - you would change the basis on which this organization was founded in giving a voice to the individual aid administrator.
Yes - Allows an institution to include membership in the budget, would not need to vary by number of staff.
Yes - An organization would pay the fee of \$100 to be a member, which would include all staff instead of \$25 per staff member and there's 10 staff members. You would look at who needs to be a member and the decision might be made of only the director and possibly the asst director for large staff.
Yes - As long as the pricing structure is competitive and realistic I think this is a good idea. Coming from an inst. where we pay our own membership SASFAA does not get a lot of revenue. However if SASFAA had an inst. it would be a net gain for SASFAA at my school (only 3 of us are members out of potentially 20). At schools that already pay the individual membership SASFAA could lose some of the revenue depending on the price structure but I would think overall it would be equal or a net gain. We (SASFAA) would need to ensure that programs and services are clearly benefiting the schools more so than individuals if we go this route.
Yes - Association Membership will allow institutions to have more members that could potentially attend events throughout the year.
Yes - Because many schools are unable or unwilling to pay the membership dues, this would eliminate the additional expense to the employee who is desirous of expanding and enriching their knowledge in the field of financial aid.
Yes - because that way all members of an institution could benefit.
Yes - Because then we wouldn't have to pick and choose who from our office is worthy of attending.
Yes - Because when an employee leaves we don't retain that paid for membership it belongs to the individual. When I hire a replacement I have to pay for an additional membership. With budgets being what they are even a small amount is sometimes difficult to approve.
Yes - But, depends on the price. NASFAA is about to price itself out of reach.
Yes - Cost efficient and you may see an increase in the number of members.
Yes - Depending on the cost, it may give more FA administrators the opportunity to attend the conference. Our institution do my pay everyone's fees, therefore they are unable to attend the conference.
Yes - For many members, their institutions pay the fee anyway. This way, you can set a fee appropriate for the institution and perhaps have it paid at the beginning of the year instead of waiting for a member to pay along with conference registration. It works on the national level.
Yes - For schools the membership could be institutional.
Yes - For schools, yes.
Yes - I am indifferent on this. If it would save money by adopting an institutional membership, then that might be something to look into. I know with our institution, not all members are or need to be SASFAA members.
Yes - I am not currently aware of the pros & cons of each but we should be considering every measure necessary to keep our organizations mission alive.
Yes - I imagine that many offices only register the individuals who attend events.
Yes - I like the idea, the schools could determine what level of membership. 1 member for x; 2 members for x+...5 members for ....
Yes - I think it is worth the time to at least investigate the idea
Yes - I wish you had a maybe. I think it should be looked into and modeled after NASFAA - but it would have to be calculated very carefully - to see if first - it would really provide more revenue. A committee should study this.
Yes - I would have ranges depending on the size (# Employees) of the institution. A large school like ours (60+) could be as much as 800 to 1000/year. For really small schools (<5) it could be \$50/year. This would be more affordable for most schools
Yes - If an individual from an organization is unable to attend, someone else from that organization can still attend.
Yes - If fees are raised, my organization will only allow one or two memberships. Right now my entire staff are members (5)
Yes - IF it is affordable it will allow some individuals to participate that might not have been able to afford it.
Yes - If it is institutional, my school will pay for it. If it's individual, I have to pay for it out of pocket.
Yes - If it was a multi-level institutional fee based on student enrollment size.
Yes - If we could conclude that it would be more advantageous financially for SASFAA to have institutional memberships, I would support that venture.
Yes - I'm not sure; it would depend on the fee structure. And since some members do pay their own fee to belong it might present other challenges



Yes - In my case, if an individual leaves then membership is already available to the replacement.
Yes - In this way we could probably earn more funds due to membership registration. If we charge by instiution.
Yes - Institution benefits from knowledgeable employees; inst should pay.
Yes - Institutional membership will encourage Directors to allow new staff to be members.
Yes - It is more likely to become a permanent part of the funding; based it on enrollment like NASFAA; that way it opens the path (potentially) for broader participation among young professionals.
Yes - It makes sense, because that gives the entire financial aid office access to the benefits of SASFAA.
Yes - It might allow to charge more and have more professional involved.
Yes - It might get more members if the institutional membership is a flat fee.
Yes - It would allow more aid office staff and other key areas access to valuable info.
Yes - It would be easier to engage an entire institution in communications and outreach efforts. It would also reduce overhead of having to track who is and isn't a member.
Yes - It would give more people the opportunity to get involved.
Yes - It's a thought, the membership fee could be raised which then would include more members of the institution
Yes - Make it like NASFAA.
Yes - Membership costs would be assumed by the organization, thus reducing individual fees.
Yes - More institutions might be more supportive.
Yes - More institutions would be able to send more staff to conferences if all that needed to be paid was the conference fee.
Yes - More staff members will have advantage of the membership.
Yes - My college would make an effort to fund it as an insitutional membership and this would allow me to send more of my staff for the excellent training events you provide. I sent 6 people three years ago and it benefited the college and my department a great deal.
Yes - Only if the rates are reasonable for the institution. NASFAA is really unreasonable. I don't want to see that happen to SASFAA.
Yes - Our insitution would pay for the fee rather than a personal fee. The fee could then be increased and include a specific number of people for each institution.
Yes - Perhaps like NASFAA, fees assessed by size of institution.
Yes - Please consider making the memership fee institutional if it is substantially increased and keeping conference registration fees low ... especially those for our annual conference since the attendance numbers are usually high.
Yes - Right now the institution pays our membership.
Yes - Save money for schools
Yes - see above
Yes - See comment above
Yes - Simpler - however, you may need to increase the fee's more (probably).
Yes - So the individual does not have to pay it.
Yes - Some institutions may not allow individual memberships, but would be willing to pay for institutional memberships.
Yes - Some institutions will not pay individual memberships for staff.
Yes - Some of our institutions will not pay the fee if it is individual because of the way state policies read.
Yes - That actually makes sense!
Yes - That would cut back on the institution trying to decide who it will or will not pay for
Yes - That would save funds for the institution, but allow the membership fee to increase.
Yes - Then you would not have to increase the fees
Yes - This is a common pratice of most professional associations.
Yes - This is a tough one; I like the concept, but the cost would have to be low enough for smaller offices to be able to afford it.
Yes - This isn't really a yes/no question -- institutional membership is acceptable as long as membership doesn't become ridiculous. Two year schools have very little money to spend on memberships.
Yes - This option works well for NASFAA

Yes - This way you keep fees low and benefit from the economy of scale.
Yes - This would allow more individuals in our organization to benefit from the SASFAA listserve as we generally only send 1-2 staff members to SASFAA.
Yes - This would be fine as long as voting can still be done individually.
Yes - This would increase number of people in SASFAA's membership that could possibly increase volunteer availability as needed.
Yes - Those paying themselves might get institutional support. In addition, there are plenty of models to look at with institutional fees.
Yes - We have several locations in KY and TN. Currently we only have a couple people each year join, so if you did something institutional, we may have all join...depending on price.
Yes - With institutions cutting back, a cheaper rate for individuals as a group from 1 institution would be something to consider.
Yes - Would give Staff the chances to access the resources SASFAA offers
Yes - Yes if the fees are rated based on the number of individual participants.
Yes - You could add members and give a group rate.
Yes - You could increase the membership fee based on FTE and the fee would include all staff members at a school. Might be able to get more student account staff to attend

**Do you suggest that membership dues be different for certain individuals versus others? (e.g. school representatives versus non-school)**

97	Yes	287	No
Why or why not? (135 responses)			

- debatable - lender ability to support is lessening too
- no opinion
- No preference
- not sure
- unsure
- You could always increase the amounts for non-schools by a slight amount above what the school representatives are paying but a large increase would defeat the purpose.
No - A little common sense and equality, please.
No - A member is a member
No - All are members for the same purpose
No - All members receive identical benefits so should not be charged differently.
No - All members receive the same benefits so should pay the same fee.
No - All members should be treated equally
No - All members should have the same services and resources at the same price. Other benefits or resources could be made available to sponsors. Another option ay be different levels of membership with different resources available.
No - As long as we continue to consider SASFAA membership as individuals with no categories that differentiate . . . costs should remain the same.
No - Because we all benefit equally from the membership and the amount charged should be in relation to what is derived but not on ability, or perceived ability, to pay
No - Because we all enjoy the same privileges when we go to SASFAA
No - because you risk losing non-school people who support SASFAA
No - Do they receive more or less?
No - Equality.
No - Equity
No - Every individual should have the same membership dues.

No - Every member should be treated equally.
No - Every organization is suffering in this economy. In my opinion, we have to be realistic and try to keep costs low for everyone.
No - Everyone is facing the same financial difficulties.
No - Everyone is getting the same information and access.
No - Everyone should be treated equally.
No - Everyone should have to pay the same fee.
No - I assume benefits would be the same so the fee should be as well.
No - I do not see the need to differentiate.
No - I don't think it would be appropriate to differentiate the membership fees. If you are eligible to become a member than you should pay the same fee as other eligible individuals regardless of your organization affiliation.
No - I don't think so - but - it could be looked at by the same committee
No - I think all members are financial aid professionals serving students in some capacity, so I think they should be assessed the same fee. When it comes to lender representatives, many of them already contribute through sponsorship anyway (which is not true for schools), and should not have to pay a differential membership rate as well.
No - I think each member should be an equal member regardless of their "work" affiliation. We have so many members that are non-school folks who provide their time and commitment to the association that we could never fill all of their positions with school-folks. Why should they pay more when they give so much?
No - I think it should because non-school would be considered privileged to obtain the info. that is available for members, which non-school are usually there to stay informed or to increase their target market, etc.
No - I think it's hard to justify "levels" of membership.
No - I think keeping it universal is better. We are all in financial aid, some just have a different roll. Whether it is a lender, guarantor, or a school financial aid officer, we are all geared toward the same function of helping students attend college.
No - I think SASFAA should maintain the "we're all in this together" atmosphere and encourage schools, lenders, guarantors, etc., to all work together as a team in serving the students. Differing levels of dues would fly in the face of that purpose.
No - I think that all members should have to pay the same dues if they are getting the same from being a member. Dues should only be different if members are receiving different services or not being allowed to participate in some way that another member is being allowed.
No - If a member has voting privileges, all members should pay the same. Some members already have limits on their membership privileges (e.g., lender employee may not be president).
No - If the thought is to make non-school dues higher, then my answer is definitely no. I haven't kept current with SASFAA by-laws so I don't know if non-school members still have the ability to vote, etc. But to ask a non-school person or organization to pay a higher fee and receive fewer services/rights from SASFAA just does not seem equitable to me.
No - If you're going to be a member, you need to support the association.
No - I'm from a private foundation and receive the same information as school representatives
No - It seems fair to make it the same for everyone.
No - It should not matter where a person works everyone should be charged the same amount.
No - Members are members regardless of where they are employed.
No - Membership fees should be the same for all attendees as we are all receiving the same benefits
No - No, not unless you intend to limit participation with the different costs of membership.
No - On an individual basis, I don't feel it would be fair to charge a higher or lower membership fees based on a person's ranking.
No - Please be fair.
No - Same benefit regardless of type of institution

No - SASFAA should continue to recognize the value of all members and the value that all members receive from SASFAA shouldn't be priced based on institution represented.
No - Should be the same because if higher for some, what added value would they receive? I don't there there would be any.
No - Should be the same for all members
No - Should be the same.
No - Similar benefits. If anything, the non school members might actually receive less benefit but the membership dues are very low anyway.
No - That is discriminatory. The membership dues should be based on participation in the organization.
No - That shouldn't make a difference since all services are the same.
No - The benefits are the same, yes?
No - The goal I think is to increase membership and participation, this may tend to alienate some valuable assets.
No - The value each member/person brings to the association would be equal. Companies are facing budget cuts also and it takes everyone to keep our association strong.
No - The whole point of membership is that the association works for all of us and is accountable to the group. If we penalize one group, I think that they will likely make some hard choices about whether or not they believe that the membership is essential to their business or decide to have fewer members from their group. School and vendor participation decisions are being made by people higher than the local membership and they may not see the value of being members if the costs increase. It's better to get some membership dues from them vs none if they decide that they are being held to a different standard of support and decide not to participate.
No - To be fair
No - We all contribute to the success of student financial aid administration.
No - We all should pay the same since we all receive the same from SASFAA.
No - We are all in the realm of educating students.
No - We are all members of this professional association, regardless of role.
No - We are an agency and pay the membership for our employees. If the fee increases, we'll adjust the number of people who are members or not join, depending on whether we are sending someone to the conference.
No - We should not treat our vendors membership differently.
No - We want to build one community. Different levels of fees may cause some individuals not to join. It also implies different levels of membership.
No - We're all in the same profession
No - We're all members, aren't we?
No - What could a possible justification for this be? I have no idea of a good argument in favor of this.
No - what would that be fair?
No - While our approaches to SASFAA may be different, I believe we are all equally important as parts of it.
No - Why would it be different. Everyone is benefiting the same.
No - Would create classes of membership that are unnecessary.
Yes - a non school representative should have to pay more to be a member of the institution
Yes - As a way to increase revenue.
Yes - Because there is a difference in membership benefits, responsibilities, and opportunities.
Yes - Common practice; non-schools generally pay more because they have different cost structures.
Yes - Corporations can typically afford a bit more. It would be important to distinguish between vendors and non-vendors since vendors are already paying the vending fees.
Yes - direct benefits of membership versus "pool of potential buyers of goods and services"
Yes - Gain additional membership and more income.
Yes - Good possibility

Yes - I think a higher amount for non-school individuals is fine. Especially given the practice of some vendors not vending but just sending people to the conference. You may consider going back to including lower (or no) registration fee for vendors who exhibit and higher fees for those who do not.
Yes - I think it could be different if schools paid it. But in most cases, I think the member pays it. In that case there should be no difference unless you get something different.
Yes - I think that you can increase non-schools to help increase revenue
Yes - I think the only way to be fair to all is to have a set price for dues
Yes - I think vendors that gain monetarily from SASFA should have higher dues. SASFA to me is an association that helps me do a better job serving our students by keeping me informed on any and all financial aid matters.
Yes - I would not have thought to suggest it, but I do agree with it.
Yes - I would think for profit and lenders could pay more than non-profit and state supported schools.
Yes - If the benefits differ for membership types.
Yes - If the conference is named SASFAA (Southern Association of Student Financial Aid Administrators) then others should be assessed an additional fee. This would add to revenue.
Yes - If there are different types of membership, dues could be reflect those differences.
Yes - if there are provisions within SASFAA that exclude non-school members from certain positions (position on board, etc), then there should be a membership due structure
Yes - Individual for schools (see above); organizational for non-schools.
Yes - Institutional for non-school, individual for school representatives
Yes - It is a good way to raise additional funds for the organization.
Yes - It is worth considering
Yes - It's definitely something to consider, as long as SASFAA doesn't price itself out of certain segments.
Yes - Lenders should be charged a different membership fee---more. This organization is for financial aid officers and it seems the lenders are sometimes in more control than the financial aid officers who actually do the work with the student on a school campus.
Yes - Lenders, vendors should pay different amounts than schools.
Yes - Level of involvement in financial aid. You could expand the types of memberships and charge accordingly.
Yes - Maybe lenders and other companies who stand to profit from membership in SASFAA can pay more than schools who are members more for the sake of doing their job better.
Yes - Membership dues from lenders, guarantors, secondary markets, etc. could be raised slightly and membership from schools kept lower in order to raise additional funding. Some non-school members are attending conferences without exhibiting in order to skirt higher exhibit costs. Charge more for non-school members who are NOT exhibiting at the conference to attend -- or, conversely, increase conference fees across the board and offer discount to SASFAA school members attending and to non-school members who are exhibiting at the conference.
Yes - More professional that way
Yes - Most organizations differentiate members based on whether they are professional members, size of organization (scale based upon size of school, and if they are vendors.
Yes - Non school members are part of the organization for a commercial reason--to increase business for their organization. There is a different mission for school vs. nonschool members.
Yes - Non-school representative should pay a higher fee for membership, this is a marketing investment for them.
Yes - Non-School representatives benefit from access to the SASFAA membership
Yes - non-school representatives come because they have special interest...usually they don't participate "for the love of it"...remember...most of them are profit-driven, so why not take advantage of this fact!?
Yes - Non-school representatives should not determine elected officials of the associations.
Yes - Non-school reps should pay more because of the services that they may offer may be proprietary for them.

Yes - Non-school shouldn't be members at all in my opinion. Most (but not all) are really marketing a service and the price of that should be different. That probably should be per organization than per person.
Yes - Organizations should serve institutions first
Yes - Perhaps a higher rate for non-school and non-guarantee agencies.
Yes - perhaps; since the fess for non-school members are typically covered by our organization it might make sense to charge differently. However, with lenders already facing serious budget cuts that might just decrease membership rather than raise more revenue
Yes - Possibility. If we lose vendor support, I would be comfortable raising fees for non-school individuals
Yes - School budgets are more restrictive and lots of people pay out of pocket for membership fees.
Yes - Schools are there to learn. Other representatives are there to gain business.
Yes - Schools have lower budgets than non-school entities. You would really need to look at the categories. If it will be strictly two, then I would suggest that the difference not be so dramatically wide.
Yes - See coments above.
Yes - That is a possibility...
Yes - The primary target audience is the financial aid professional. Peripheral professional staff could pay a higher cost for the benefit of participating in the organization.
Yes - The schools really need the information whereas the non-school members use it more for contacts and such.
Yes - There should be a lower fee for retired members.
Yes - These associations were established to promote financial aid and financial aid awareness; provide training for members and opportunities to network with colleagues to "lobby" for access and equity in educational opportunities for all people, no matter their differing abilities to pay. Lenders are not your friends - their companies are not your friends. Yes, the people either are often or often become your friends but that is their job. Charge their companies appropriate fees to interface with your members - school personnel.
Yes - This would protect the lenders. As a conference chair for my state association this past year, we saw a huge decline in vendors exhibiting at the conference. Many came and just did not exhibit. However, they had access to "exhibit" to members. They are still taking advantage of the marketing opportunity when they network with members.
Yes - Vendor membership dues should be higher.
Yes - Vendors can pay more.
Yes - Vendors have an agenda
Yes - Yes, deliniate from other than financial aid advisors or administrators.
Yes - Yes, the fee should be different but I don't have the answer about how.
Yes - You could also have a range of fees for individuals that are at different levels. Someone who is just entering this field and is making less money could have an opportunity to join for a reduced fee (i.e., clerical staff-\$10, Counselors - \$25, Asst. Dir and above \$45, etc...you could even have different levels for community colleges vs. universities, etc.
Yes - You could structure the fees that way. School reps could be a bit lower than vendors.

#### Are institutional/organizational budget cuts affecting you this year?

344 Yes 64 No

If yes, please explain. (222 responses)

No - But they will affect us in 2009-10
No - But they will next year!
No - I resigned in May.
No - Not at this time, but we have a feeling it may soon.



No - not yet
No - Not yet although our travel funds have always been very limited.
No - Not yet but it has many in our industry.
No - Not yet but you never know
No - Not yet, but decisions are supposed to be made after the 1st of the year re: where cuts can be made.
No - not yet, but I foresee it in the near future
No - Not yet.
No - Online universities are thriving. In your categories, you need to begin to recognize the existence of legitimate, accredited online universities offering educational degree programs. Move into the 21st century.
Yes - 6% reduction in operating budget, including travel.
Yes - Across the board budget reduction, staff, travel.
Yes - Affects me thru my dept.
Yes - Alabama is in proration. Budgets have been decreased or cut to the bare minimum. All travel must be "necessary", or paid another way.
Yes - All budgets are being decreased (especially out of state travel).
Yes - All chances of additional staffing support have been cut.
Yes - All departmental operating budgets have been cut by 20% and hiring is being handled on a case-by-case basis.
Yes - All travel, except essential (which must be approved by a VP), has been eliminated.
Yes - Approximately 25% loss to budget since start of fiscal year. Most travel has been eliminated.
Yes - As an organization, we've had to reduce our travel budget due to reduced revenue.
Yes - Budgets are currently under review, not sure of the extent of the reductions at this time.
Yes - Budgets have already been cut and I expect they will be cut again after the spring term begins.
Yes - Can't travel out of state so can't attend SASFAA conference
Yes - Cut back on out of state travel.
Yes - Cut outs of out of state travel, requests to reduce office budgets, etc...
Yes - cutting on travel
Yes - Decline in revenue in the state thus it affects all public schools in the state.
Yes - decrease in staff, those leaving offices will not be replaced
Yes - Due to a decrease in my institutional aid, I was not able to award as many "eligible students" and the amts. were much less than in the past. Also, travel cuts has caused us to re-evaluate conferences that would be beneficial for the office and affordable
Yes - Everyone has had to be mindful of travel expenses due to the economy. Also, some departments have not been re-staffed due to hiring freezes.
Yes - Everything has been cut back.
Yes - Financial shortfalls in state funding; no raises, no hiring, cuts in the college's operating budget and still additional cuts may be forthcoming.
Yes - Had to make a specific request in order to attend this year's conference.
Yes - Have to be more selective with travel and fewer staff can attend.
Yes - Having to cut back and weigh expenditures carefully.
Yes - However, it is minimal because it appears that we may have minimum cuts in the Spring 2009 but planning for future budget cuts will take place in 2009-2010.
Yes - I am able to come this year but my out of pocket expenses will be a bit more because of travel limitations.

Yes - I am in an not for profit organization that is facing the same concerns -- decreasing budgets, decreasing sponsorships, and general belt tightening.
Yes - I am not able to hire additional support.
Yes - I am not sure my institution will be able to attend the Feb. conference in Myrtle Beach.
Yes - I am now working solo.
Yes - I am under a 12-15% budget cut this year, and will probably be the same or higher next year.
Yes - I cannot send anyone to the conference and I would be there if I was not involved.
Yes - I feel that my attending conferences is not looking good for this year.
Yes - I have been told that next year I can only attend a very limited amount of conferences. I must choose them wisely.
Yes - I have had to be more selective on travel to which conferences
Yes - I have had to take on additional duties due to a positions being cut because of budget.
Yes - I have not been able to attend the mid-level manager's institute or the management symposium which I was told that I would be able to attend this year.
Yes - I might not be coming to SASFAA. Not sure yet. I already missed my State meeting
Yes - I normally would be attending the SASFAA conference but because of budget cuts I will not be there.
Yes - I personally will not be attending the SASFAA Conference next month due to budget cuts. Only one person from our office can attend regional/national conferences now.
Yes - I think it is hitting everyone.
Yes - I think this is a nation wide epidemic due to economy. Being a state agency, we have had to cut budgets and decrease travel. I know of other agencies that are facing the same delima.
Yes - I was scheduled to attend SASFAA and present. I will not be able to do so after all, even though I live in South Carolina. Travel is restricted and I can not afford the conference on my own.
Yes - I will have to justify attending the conference.
Yes - I WILL HAVE TO PAY IT ALL MYSELF AND I HAD BEEN BEING REIMBURSED
Yes - I will not be able to attend the conference and I have done so for the last 4 years
Yes - I will not be able to attend the SASFAA conference for the first time in many years due to a lack of travel funds. While the practice of rotating the lconference location among the nine states makes sense, it may be more practical to consider having the conference in more centrally located cities that are easier (and cheaper) to travel to, such as Nashville or Atlanta, at least for a couple of years.
Yes - I will probably have to pay my way to the Annual Conference. I have always attended the Management Institute, but I could not attend the recent one.
Yes - I work at a state university and our travel expenses have been cut. I will not be able to attend the conference in February.
Yes - If someone says, no, they are living under a rock.
Yes - I'm having to decide which training I would like to attend.
Yes - In short....travel, supplies, and no raises. 09-10 is set up to be worse as our Governor just announced yesterday that 4 year public schools have to give back 15% of their budget to the state. That's tough b/c 80% of our university budget is in salary. This might mean layoffs and/or no professional development at all.
Yes - In the past I have been able to let one of my employees attend conferences but this year as Manager of the office, I will be the only attending the annual conferences. This mainly due to the first thing to be cut in many budgets is travel costs.
Yes - It will be more difficult to justify any expense due to the cuts.
Yes - lay offs and pay reductions across entire school



Yes - Layoffs have occurred, loan program benefits have been cut, personnel benefits have been cut
Yes - Less funds to travel to conferences.
Yes - Less money allotted for part time helper.
Yes - Less money for out of state travel
Yes - less money to spread around
Yes - less people allowed to travel if any. reduced office supplies, phones etc doing more work with less resources
Yes - less travel and education money
Yes - less travel and less money to put toward all conferences
Yes - less travel budget so could not sponsor at previous levels or in some cases not at all
Yes - less travel for training
Yes - Less travel.
Yes - Less travel. Less face to face networking.
Yes - less travel...having to do more with less
Yes - Like at many institutions, our department's budget has been restricted for certain items, meaning that overnight travel and other professional development will not be permitted after January.
Yes - limited travel funding
Yes - limited travel opportunities
Yes - Limited travel to conferences and training.
Yes - limited travel, if any.
Yes - Limited travel.
Yes - Limits on travel and conference participation will be taking effect preventing our organization from vending or sponsoring in certain situations.
Yes - Limits the number of conferences we can attend based on priority.
Yes - Limits the number of staff who can attend meetings.
Yes - moderately but not significantly
Yes - More of a focus on what's "necessary" versus what is "nice to have." No longer doing things just because we have always done it that way.
Yes - My operating budget has been decimated. Still planning (tentatively) to attend SASFAA conference but state legislature is in special session to deal with deficit so further cuts may be forthcoming that eliminates travel.
Yes - My organization is not allowing any out of state travel and if we do any travel within the state we have to share a room or if it is in so many miles we have to comunitie back and forth.
Yes - My organization is not allowing us to travel to events such as the SASFAA Conference or any other types of workshops and trainings.
Yes - My school is not paying for me to attend the annual conference this year.
Yes - My state has a 2.3 billion dollar shortfall and we have experienced a 4% budget cut and we are now facing an additional 5%.
Yes - My travel budget has been slashed as well as all consumables. No raises for my already underpaid staff and myself now and for the near future.
Yes - My travel is limited.
Yes - no lay-offs yet, but if it continues this way...the 2010 could be a disaster.
Yes - No more travel, no more association dues will be paid
Yes - No one is traveling. Only the director and very limited travel by associate director. Our school has over 65 financial aid employees.

Yes - NO Travel (even local), no conferences, supply budgets cut, we have to watch printing closely (sign out paper!), 15 hour furloughs, college laid off 7 people,.....
Yes - no travel budget and no replacement of staff that leaves
Yes - No travel is reimbursed any more.
Yes - No travel with out begging.
Yes - Normally, I attend the annual conference and had made plans to attend this year, but our school may have to furlough and it would not look right for me to go to Myrtle Beach while employees are losing pay
Yes - Not able to send as many staff members out to conferences or workshops. We are limited due to new year events that we deem everyone should attend in the office.
Yes - not attending confrence this year
Yes - not sure if I can attend the conference in Myrtle Beach even though I'm a presenter and moderator at the conference.
Yes - only mandatory travel is allowed.
Yes - operational decline.
Yes - Organizations must be prudent regarding expenditures.
Yes - Our cuts have run DEEP. We are down 4 staff members and are not able to fill the jobs due to budget shortfalls. This has made a huge impact.
Yes - Our organization had major funding cuts which cut out our cost of living raises.
Yes - Our salaries have been cut and budgets have been cut to reduce spending on traveling, conferences, etc.
Yes - Our school has had a 50% travel reduction. We have to get special permission to travel.
Yes - Our school may not be able to send the usual number of people to the conference.
Yes - Our state employees did not receive a raise this year
Yes - Our state mandated a 6% decrease which has affected every aspect of our personnel budget. And we use the administrative cost allowance to fund our operating budget--this is 34% lower in FY09 than FY08. Conferences like SASFAA are not a priority for us under these circumstances.
Yes - Our travel budget has been cut so we can only attend maybe one conference every other year.
Yes - Our travel was cut so that our office can only participate in one conference this year.
Yes - Out of state travel has been cut along with the number of individuals being allowed to attend conferences and trainings.
Yes - overall expenses on all ends.
Yes - Overall operating budget significantly cut due to economic situation. Cutting back on travel except where essential.
Yes - Paying own way to SASFAA conference due to budget cuts; staying at lower cost hotel off-site
Yes - Perkins funds depleted, and several lenders opting out of educational lending
Yes - Potentially
Yes - Reduced budget - need permission to travel.
Yes - Reduced travel and operating budget may prevent me from attending the conference and other training.
Yes - Reduction in staffing, reduced travel funds.
Yes - Restricted travel, hiring freeze, no equipment purchases allowed
Yes - Retirees --
Yes - Rumor is that there will not be pay raises.
Yes - Select travel only....has to be madatory and defended!
Yes - Self-explanatory

Yes - Severe budget cuts.
Yes - Severe budget cuts. Little to no travel. Potential staff reductions.
Yes - Severly cut travel
Yes - Staffing, less grants, higher tuition
Yes - Substantial reductions/eliminations in travel and membership.
Yes - The Commonwealth of Virginia has to balance it's budget which is in the red. Higher Ed has been cut significantly.
Yes - The cut in budgets are restricted our participation in several state conferences as well as certain events that we either sponsored or participated in the past.
Yes - The economey is bad
Yes - The institution refused to pay for more than one member to attend SASFAA
Yes - The state of Alabama is now in budget proration, which means budget cuts and freezes for the remainder of 08-09
Yes - There are items that are being eliminated or reduced. Travel is one thing that is being affected.
Yes - They affect everyone. My school hasn't cut our budget but because state schools in GA have been cut I have had to take a larger role in state, regional, and national conferences. It has also had an affect on the attendance at conferences which in turn makes the conferences less rewarding for those of us who are able to attend.
Yes - Training will take place when there is a benefit for the school, not just individual.
Yes - Travel & operating budgets decreased
Yes - Travel and all other spending is cut... along with positions.
Yes - Travel and training are down.
Yes - Travel at my institution is frozen.
Yes - Travel budget freeze at mid-year, vacant position freeze.
Yes - Travel budget has been cut 20%.
Yes - Travel budget may be cut
Yes - Travel budgets have been cut and employment opportunities limited.
Yes - Travel expense has been drastically reduced, as well as staff members.
Yes - travel expenses are not available
Yes - Travel has been cut and the college as a whole will be taking a week furlough.
Yes - Travel has been cut drastically.
Yes - Travel has been frozen.
Yes - Travel has been impacted.
Yes - Travel has been limited. Conference attendance is limited.
Yes - Travel has been reduced so that my office cannot send as many people to training conferences.
Yes - Travel has been significantly cut.
Yes - travel is almost cut completely; possible layoffs in new year
Yes - Travel is being cut
Yes - Travel is being cut back unfortunately in a time where sufficient information and training is crucial.
Yes - Travel is being heavily scrutinized - all purchases require VP level approval
Yes - Travel is greatly being reduced.
Yes - Travel is harder to get approved.
Yes - Travel is limited
Yes - Travel is limited
Yes - Travel is restricted.

Yes - Travel is very limited.
Yes - travel money cut,
Yes - Travel restrictions
Yes - Travel restrictions, Cannot attend conferences
Yes - Travel restrictions. Hopefully, it won't go much farther than that.
Yes - Travel to conferences is hindered.
Yes - Travel to the SASFAA conference may be restricted.
Yes - travel, meals
Yes - travel, personnel and membership support will all be affected
Yes - travel, supplies, jobs
Yes - Traveling has been cut
Yes - Traveling to conferences will be an issue this year. Must be local to attend.
Yes - Tremendous emphasis on watching every penny spent for operating costs. Announcement of hiring freeze.
Yes - Tuition increases have been held to all-time lows, which means our office will have to cut everything.
Yes - Unable to have all staff pay membership and cannot attend anything except SASFAA and only because it is in SC (home state).
Yes - very little travel approved
Yes - We are all experiencing it!
Yes - We are having to be far more selective in our participation and attendance at events.
Yes - We are having to reduce spending
Yes - We are not allowed to travel as much without showing that the conference has some value to the University.
Yes - We are operating at 80% of our normal budget
Yes - We are sending less people, cutting back travel and looking very hard at sponsorships.
Yes - We had to cut about \$70 million dollars in our district and more cuts are coming in the 2009-2010 school year too.
Yes - We have a spending freeze at this current time.
Yes - we have already seen 10-12% and will be having another 5-8% in january. i am actually buying office supplies out of my own pocket.
Yes - We have already taken a 3 percent cut of state funds. Nevertheless, we are harmed less than many other institutions because about half of our administrative fundings comes through private sources and/or overhead from university research grants.
Yes - We have been asked to cut travel and other expenses.
Yes - We have been asked to give up current travel allocations and to not expect any travel money next year.
Yes - We have been asked to reduce travel costs and our budgets by 5 - 9% for the upcoming fiscal year.
Yes - We have been told there is no travel reimbursement for any kind of travel. We also expect additional cuts during the next year. That is something that SASFAA should be aware of. This year is just the beginning. The schools budgets may not recover for at least a couple of years.
Yes - We have cut all travel.
Yes - We have had a slight cut to our office budget already, and more cuts are anticipated after the New Year. Travel and hires are currently being scrutinized, but so far, no freezes.
Yes - We have had to cut back on travel so neither I nor my staff will be attending as many conferences as we have in the past.
Yes - We have less money and resources available to us. So, where we used to be able to do 'this and that'. We now have to decide between 'this OR that'.

Yes - We have lost all travel funds and will probably lose staff in the next round of budget cuts. On-line resources are vital to our survival at this time.
Yes - We have lost half the staff and the work is not less and without salary increase.
Yes - We have not have formal cuts, but we have been encouraged to continue to be frugal and use available resources wisely.
Yes - We have undergone major budget cuts eliminating any training and many conferences from our schedule and we are still looking for more to cut back.
Yes - We have very little school money for travel.
Yes - we may not be able to send the normal number of people to conferences.
Yes - We will be travelling less to conferences. I may only be able to send a couple to each conference rather than several folks.
Yes - We've been asked to make budget cuts within the department which means something or some service, etc. will go lacking for now.
Yes - Will not be able to attend SASFA. Travel budgets have been cut..... Had to make a choice and attended the SFA Conference in December.
Yes - Will not be attending the conf this year
Yes - Yes and no, I am retired, but the GASFAA is being dramatically affected. Attendance is off about 50% and travel dollars no longer exist for state schools.
Yes - but not concerning SASFAA membership or travel.
Yes - we have a hiring freeze and extras like some travel are limited. We will likely not get raises in the upcoming fiscal year.

## ABOUT OTHER SASFAA BENEFITS

### Which of the following SASFAA services have you used?

231	SASFAA member searches on the web	128	Posting messages to the SASFAA listserv (versus just reading them)
328	SASFAA newsletter		

### Please indicate which of the following SASFAA benefits you consider the most valuable by rank ordering their importance to you. ("1" is considered the most important service, "9" is of least importance to you.)

SASFAA member searches on the web	Average rating 5.47 (of those who ranked)	Ranking 7
SASFAA listserv – reading financial aid news and association announcements	Average rating 3.28	Ranking 2 *****
SASFAA listserv – learning about job openings	Average rating 5.95	Ranking 9
SASFAA listserv – being able to post messages to the membership	Average rating 5.27	Ranking 5
SASFAA newsletter	Average rating 4.27	Ranking 3 *****
The opportunity to network with colleagues	Average rating 2.60	Ranking 1 *****
The opportunity to volunteer at an event or on a committee	Average rating 5.49	Ranking 8
The opportunity for leadership development as a SASFAA officer	Average rating 5.30	Ranking 6
The opportunity to support SASFAA in legislative advocacy efforts	Average rating 5.23	Ranking 4

**Would you suggest that SASFAA expand its offerings to include any of the following? Check all that apply.**

312	Webinar training	159	Scholarships to attend SASFAA events
134	A structured mentoring program	<input type="checkbox"/>	Other (23 comments below)

A structured mentoring program can help with costs, growth and fellowship within the organization and make it stronger.			
all good ideas			
HAVING A BUDDY SUSTEM @CONFERENCES FOR PEOPLE WHO DO NOT COME AS A GROUP			
I am supportive of the scholarships - I think it would be wonderful if SASFAA could help members participate in events by subsidizing the cost for those who cannot afford it. Then people don't have to miss out.			
I don't know that this is the time to expand any offerings. I would prefer that we strengthen the conference.			
I find myself utilizing webinars very regularly. If they are presented on certain dates and then replayed or available at any time, this is very helpful.			
I found webinars from the US Dept of Ed very good.			
I think that the webinar training is an excellent idea. The cost is minimal to the association as a school could host the webinar and many have the technology already. I have presented in this area for several different sessions including recently a HEA webinar for Graduate/Professional schools in which we had 172 people attend. It allows for those who have had travel budgets decreased to attend training sessions. Even if a minimal cost was charged (say \$25) then people could attend that can't make the conferences.			
Mentoring - I think this is helpful for the newcomers.			
Just be certain to coordinate with state and national associations.			
more communication with other schools even if it only for a day or a weekend and the memeber foot the bill - networking is important to financial aid			
More news pieces and infromational pieces focused on the new aid officer.			
Not until there is a thorough review of SASFAA's purpose for existence and relevancy in today's environment. Is there something that SASFAA needs to do that is not being accomplished by the states or NASFAA or ED, etc.?			
Particularly Webinars and Scholarships since I have been unable to attend events due to cost to the organization.			
Please do not duplicate the efforts of NASFAA			
Please provide more Webinar training as it allows several individuals who are unable to attend a conference or training due to budget cuts to view the training from their office or home.			
Possibly the webinar training however as I expressed previously, there are other agencies offering webinar training and it is difficult to find individuals who have the time and the knowledge to devote to webinar training. You may want to check with VASFAA as their training committee offered webinar training in the fall.			
SASFAA needs more of a presence in the schools besides internet. Possibly more exposure at the state conferences.			

SASF AA should continue to focus on face-to-face training efforts for new, mid-level and experienced aid professionals. There are webinars all the time but that cannot replace in person interactions for many aspects of our profession. Structured mentoring would be great for those that need it. However being in NC we have lots of opportunities to connect via our state org. so that is not overly important in my opinion. However other states in the region might need help with mentoring.

Webinar training might be a good idea as long as training efforts not be duplicated by others.

Webinars have proven to not be so helpful...there is a one way communication only. I would rather listen to NPR than to a webinar presenter...it's so boring.

Yes; a mentoring program. Young professionals need support and opportunities to excel, and they need some of us with experience behind them, to advance them.

You might want to be sure you involve retirees in helping promote desired legislation.

**Do you have any other comments that you wish to share? (57 responses)**

Being part of a professional organization is imperative to being all that you can be in your profession. I have been a member of one or more financial aid associations for 25 years now and it has been a source of networking, information, professional development and, most importantly, friendship in a world that most people don't understand. I will always be a member of an \_AFSAA!

Do not duplicate what is already offered by NASFAA

Get as many Feds as possible for the conference - this helps with the travel justification

Given the challenging economic environment, members may be faced with having to assume membership, travel, etc costs. Alternatively, there should be an increased effort by state associations to pick up on that. State associations will be similarly battling cost issues and will need to show what they do for its members.

I appreciate your proactive leadership in creating this survey!

I attended the leadership symposium for the 0809 year. The training was invaluable, the new friendships acquired will be for a life time. The Facilitators were all outstanding and the experience and knowledge I received will never be forgotten. Each facilitator made their session come alive and practical. I feel the entire experience mirrored realistic business practices and scenarios, which made it easy to grasp and apply to my own leadership situations. It also allowed me to identify my strengths, weaknesses and passions. It reiterated my passion and love to serve people in every aspect.

I realize as I complete this that FSA is offering training that we consider quite valuable and could displace SASFAA further as a resource. Consider how to define SASFAA's niche....what training is not offered by FSA that strengthens an FAAs skills? FSA may offer technical training, but what about the art of administering aid? It is not all science.

I think SASFAA should find more ways to synergize with NASFAA and VASFAA, because there seems to be redundancy in the efforts to reach out... this actually might be a way to make things more affordable all around.

I think that SASFAA (as well as all FA associations) needs to reevaluate its purpose and mission in light of the times we are in. What is the "need" for SASFAA, NASFAA, state associations? Yes, there is always benefit in professional networking, but beyond that, what will be the legacy of FA associations 20 years (or 10 years) down the road?



I think that the leadership should work throughout the year to be more visable to the membership at large.
I think the SASFAA Newsletter is excellent - I just don't use that on a daily basis - is why I rated it lower than I wanted to.
I thoroughly enjoy SASFAA conferences and love to attend the sessions that apply to verification beginner and advanced. They are so very helpful to me and my institution.
I truly enjoyed working with the students. I fear that before long there will be only Direct loans.
I would like to see SASFAA invite more of the new members to be a part of committees so that we can have an opportunity to network and get to know people. I signed up to be on several committees but never got a response
If you want to speak with me further, I am Elizabeth Desi and I work for the University of Mary Washington. 540-654-1790 edesi@umw.edu
In these challenging times, I think ALL professional organizations are going to have to justify their existence and their cost to the members and their institutions. I think regional associations will have the hardest "sell;" we understand state and national issues and the need to advocate for them; how many genuinely regional issues do we tackle? While I always find the conference worth my time and expense, it's becoming increasingly viewed as a personal and not institutional benefit for me to attend. I expect I'm not alone in this regard.
I've been a member of another regional FAA group and SASFAA is by far superior in what it offers to its members. We are all well served by SASFAA.
Just like NCASFAA, I have always been so proud of the people and programs of SASFAA. The organization is very important and even though we are all going through some rough financial times, we just need to adjust to keep these important associations in tack. Thank you!
Keep up the good work!
Leadership symposium was incredible and should be retained.
Many states are considering going to one conference per year. With SASFAA in February, NASFAA in July, and FSA Conferences in the fall, it may well be worth the discussion of the Board (and State Presidents) to consider discussing if states are having their conferences in the fall or spring. The idea is to space out the conferences throughout the year to allow for timely training. For example, I am in SC and with the SASFAA conference in February (in Myrtle Beach), our spring conference is roughly 6 weeks later in Myrtle Beach. It may be that SC needs to ensure our annual conference be in the fall. This would allow proper spacing. More folks are likely to attend SASFAA than the FSA Conference (cost consideration) so a fall conference during the FSA season would be less likely to affect plans for most folks - hope this makes sense - it is after 5:00 and been a long day :-)
N/A
Need to Expand the categories of "organizations that best describe you" I'm the Ex Dir of a non profit that supports access and affordability to attain higher education....nothing even close!!! (I cheated and used 2 yr public, as that was my last FA related job) and I don't mind being identified!! Tom Morehouse tom.morehouse@virginiancan.org
needs more information in regards to non-term programs
no
No
No comments at this time



No.
No.
No. I think SASFAA is currently doing a good job for its membership and the Financial Aid community.
None at this time but this survey was a good idea and much needed.
SASFAA friends are lifelong friends. Perhaps you will want to initiate a retirees reunion as we have successfully with NASFAA. I served as President as Marleen B. Ingle
SASFAA has "lost its way" over the years or maybe the advent of technology has reduced the value of SASFAA services. Other than networking with SASFAA colleagues, I really have to ask what SASFAA gives me that I don't already get elsewhere. The answer so far seems to be "nothing". Maybe you are doing things that just haven't hit my radar screen. In that case, maybe the question is marketing and visibility. Technology is a double-edged sword. I used to always read the newsletter, for instance, but haven't looked at it once since it went online. In fact, I don't go to the website at all except when I need to register for a conference.
SASFAA has been a blessing to me and the contacts I have made through the association are priceless.
SASFAA is a great organization - I hope you have a future annual conference coming soon to Orlando, Florida!
SASFAA is a great organization and has consistently offered great conferences and leadership opportunities. SASFAA has offered a variety of services that have made us better administrators and has helped our students get the funds needed for college. Has been a win /win situation where the better informed we are the better and the stronger are institutions have become.
SASFAA is a much better organization than Tri-State or EASFAA. You all really are on the ball when it comes to communicating financial aid needs with others.
SASFAA is a wonderful association. I have enjoyed my time and the friendships I have made. I truly came to appreciate our organization during the brief time I spent in another region of the US.
SASFAA is one of the better associations in my opinion. Your conference agenda is excellent. The website is your identity badge - it needs to always be up to date. Helping your member state associations to do the same should be a role you help to play. Most make the profession look lazy and are almost always out of date.
SASFAA needs to become self supporting from fees that the members pay not relying on sponsor fees. Any sponsor fees received can be used to support training efforts, etc.
SASFAA needs to focus mostly on the schools, not the vendors.
SASFAA needs to update its training format. I think a lot schools will now be required to justify spending resources to attend a conference. If you get all of the information on the web, it becomes problematic for the SASFAA member trying to attend the conference.
Service on committees has been personally and professionally rewarding.
Sorry it took so long.
Stay Strong!
The ability to have access to all seminar information (handouts) through a website that are performed at the national conference
The annual conference is awesome each year.
The Association is a great resource for professional growth and development.

The boards, both past and present, have done a fantastic job.
The number one benefit of membership in my opinion should be to learn and expand our understanding of federal and state statutes and regulations. I was surprised that this is not listed in the nine benefits above.
The summer institute was a wonderful experience for me a few years back.
There was not a selection for previous SASFAA service, in which I have worked SASFAA Registration and Conference packets compilation
To many FAAs, SASFAA seems remote and distant. Need to co-brand initiatives with State Associations
To survive, every organization needs to adapt to the times and change. So too does SASFAA. To the leadership, the organization is very important. To every-day rank-and-file members-- not as much. As much as I have enjoyed the board meetings and events and socializing over the years, those times have passed. Focus on offering an outstanding conference, and workshops.
What is most needed for someone without any training to begin the job?
Yes, please go to the Western Interstate Commission for Higher Education (WICHE) website and review "Knocking at the College Door," for a sobering insight into the challenges that the South will face with regard to enrolling a diverse and growing (rapidly growing) cohort of students, while the rest of the country falls into enrollment decline (except for a little better showing in the West). It is very instructive. We need one another through all of this.
YES, THE FOOD WAS THE BEST WE HAVE HAD @OUR LAST CONFERENCE

**If you wish to be considered for the \$25 VISA card please provide your e-mail address below (optional - will not be identified with your survey responses). 270 provided emails**

	Winner was Glenda Latimer of Jackson State University in Mississippi. The Visa card was mailed to her.
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**THANK YOU!** *Your feedback is greatly appreciated!*

*SASFAA exists to serve the needs of its membership. With your help, SASFAA can continue to provide the support and training we all need in order to do the important work of our profession - helping students afford a higher education.*