

AGENDA
SASFAA Board Meeting
Hyatt Regency Jacksonville
August 6-8, 2010

Friday, August 6, 2010

3:00 PM to 5:30 PM	Afternoon Break	Grand Ballroom 6
	Call to Order, Welcome and Introduction of Guests Announcement of Substitute Voting Establish a Quorum <i>Action Item: Approval of Agenda</i> Welcome to Florida	Sandy Neel Nathan Basford
	<u>Report of Officers</u> President President-Elect Vice President <i>Action Item: Approval of Committee</i> Past President <i>Action Item: Approval of Committees</i> Secretary <i>Action Item: Approval of Committee</i> Treasurer	Sandy Neel Brad Barnett Brenda Burke Keith Reeves Amy Berrier Jeff Dennis
6:00 PM to until	Dinner as a group	Chicago Pizza
8:00 PM	Hospitality	On Your Own

Saturday, August 7, 2010

8:00 AM	Continental Breakfast	Grand Ballroom 6
9:00 AM	<u>Committee Reports:</u> Budget and Finance <i>Action Item: 2010-2011 SASFAA Budget</i> <i>Action Item: Approval of Committee</i> Conference <i>Action Item: Approval of Committee</i>	Marian Huffman Brenda P. McCafferty
10:30 AM	Break	Grand Ballroom 6
10:45 AM	<u>Committee Report (cont'd):</u> Site Selection <i>Action Item: Approval of Committee</i> Membership <i>Action Item: Approval of Committee</i> Vendor/Sponsor <i>Action Item: Approval of Committee</i> <i>Discussion Item: Revenue Task Force</i>	Lisanne Masterson Bryan Erslan Dewey Knight
	<u>State Presidents' Reports</u> Virginia Tennessee South Carolina	Heather Hollandsworth Sandra Rockett Jeff Holliday

North Carolina

Paul Coscia

12:00 PM

Break

2:00 PM

State Presidents' Reports (continued)

Mississippi
Kentucky
Georgia
Florida
Alabama

Donna O'Quinn
Dave Cecil
Doug Tanner
Nathan Basford
Amanda Sharp

3:00 PM

Committee Reports (continued)

Legislative Relations

Action Item: Approval of Committee

Electronic Services

Action Item: Approval of Committee

Web Site Training

Newsletter

Action Item: Approval of Committee

2020 Committee

Action Item: Approval of Committee

Bill Spiers

Joe Dobrota

Ben Baker

Runan Pendergrast

4:15 PM

Liaison Report

Agency
Lender

Janet Nowicki
Janet Nowicki

Special Appointee Reports

Long Range Planning

Action Item: Approval of Committee

Leadership and Mentoring

Action Item: Approval of Committee

Ron Day

Heather Boutell

5:00 PM

Recess

6:30 PM

Dinner

On Your Own

Sunday, August 8, 2010

8:30 AM

Plated Breakfast

Grand Ballroom 6

9:00 AM

Unfinished Business

10:30 AM

New Business

11:00 AM

Adjourn

AGENDA
SASFAA Board Meeting
Hyatt Regency Jacksonville Riverfront
August 6-8, 2010

Friday, August 6, 2010

CALL TO ORDER

President Sandy Neel called the meeting to order at 3:01 p.m.

INTRODUCTIONS

Nathan Basford, FASFAA president welcomed us to the great state of Florida. Bill Spiers also welcomed us to Jacksonville since he is a native of the city and gave a bit of history about the city.

The following elected board members were present:, President, Sandy Neel; Past-President, Keith Reeves; President-Elect, Brad Barnett; Vice President, Brenda Burke; Treasurer, Jeff Dennis; Amy Berrier, Secretary.

State Presidents in attendance were: Heather Hollandsworth, Virginia; Sandra Rockett, Tennessee; Donna O'Quinn, Mississippi; Dave Cecil, Kentucky; Amanda Sharp, Alabama; Doug Tanner, Tennessee

State Presidents absent were: Paul Coscia, North Carolina; Jeff Holliday, South Carolina

Committee chairs were in attendance: Marian Huffman, Budget and Finance; Brenda McCafferty, Conference; Bill Spiers, Legislative Relations; Joe Dobrota, Electronic Services; Runan Pendergrast, 2020; Lisanne Masterson, Site Selection; Ron Day, Long Range Planning; Bryan Erslan, Membership; Janet Nowicki, Lender/Agency.

Committee chairs absent were: Ben Baker, Newsletter; Dewey Knight, Vendor/Sponsor

Action Item: Brad Barnett moved that we approve the agenda with the president authorized to make adjustments to facilitate the flow of business. The motion being seconded by Brenda Burke was approved.

REPORT OF OFFICERS

President, Sandy Neel

Sandy reviewed her written report (see Attachment A)

Complete goals and objectives by September 1st – due to Sandy.

President-Elect, Brad Barnett

Brad reviewed his written report (see Attachment A)

Vice President, Brenda Burke

Brenda reviewed her written report (see Attachment A)

Secretary, Amy Berrier

Amy reviewed her written report (see Attachment A)

Action Item: Minutes from the June board meeting were approved.

Treasurer, Jeff Dennis

Jeff reviewed his written report (see Attachment A)

Jeff distributed the pending final budget for 2009-2010. The 990 has been signed and mailed. Expenditures were made in 2009-10 that exceeded the budgeted amount without prior approval, which is in conflict with The Guide to Financial Management. No action can be taken at this time to resolve the overspending.

Misc. Income – \$2872.94 refund from the Hyatt in Louisville (penalty) from sales tax. Jeff also has another \$155 coming in from the Don Cesar.

Sandy Neel declared a break at 3:45 pm and reconvened the meeting at 4:03 pm

COMMITTEE REPORTS

Budget and Finance, Marian Huffman

Marian reviewed her written report (see Attachment A)

Marian passed out folders to each board member regarding the 2010-2011 budget. Sandy asked each board member to review the folders after Marian explained the contents for tomorrow's discussion. Discussion ensued about what expenses to count for elected officers and other board members so that individuals could review their budgets tonight for tomorrow's discussion.

Marian reviewed the proposed 2010-11 budget that was sent out to the members (see Attachment B)

Ron Day suggested that we do a comparison study with other regions about what they pay for and what their budgets consist of.

Conference, Brenda McCafferty

Brenda reviewed her written report (see Attachment A)

Changes – no continental breakfast each morning at the conference. Laura Diven-Brown is Brad's 2012 Conference Chair. The committee is planning for 400 attendees. The hotel rate for the Hyatt is \$159. Registration should go live September 1st with the hotel. Rough agenda will go live on September 15th to help schools work on getting approval to attend SASFAA 2011. Charity is the Wounded Warrior Project. Theme for the banquet will sort of honor our hometown heroes. The Conference Committee will showcase each committee in some creative way. Brenda is asking each committee chair to do a type of presentation board to be on display during the conference for members to look at. We will also possibly have 2011-2012 paper volunteer forms for Brad's year available if a committee chair has a conversation with a particular member who is really interested.

Sandy Neel recessed the meeting at 5:03 pm until Saturday morning.

Saturday, August 7, 2010

Sandy Neel reconvened the meeting at 9:06 am.

COMMITTEE REPORTS cont'd

We will wait to discuss the budget until after we have a conference call with Dewey, Sponsor Chair at 10:45 am.

Site Selection, Lisanne Masterson

Lisanne reviewed her written report (see Attachment A)

Lisanne discussed the importance of finding sites for the 2012 conference, future transition meetings, and the NAOW. She wants to expand on the site selection manual to include information from each of the 9 states on what places are the cheapest to go, information on travel, contact information, and so forth. She looked at recommendations from the Past Presidents and the Budget Recovery Task Force with centralizing the conference site – Nashville, Charlotte, Atlanta, and Orlando. She also expanded to Birmingham and Greensboro/RDU.

Lisanne passed out a spreadsheet of hotels that she received bids from and provided information on travel costs.

Brad mentioned using a company called IMN, which EASFAA used, to help negotiate a contract. This company helps groups negotiate contracts at different facilities. Bill Spiers mentioned that Florida used a meeting planner for years but discussed that they found things missing in contracts and got better concessions on their own. Discussion ensued about checking the perimeter of Atlanta, and Nashville.

Lisanne will go back to certain areas of Atlanta etc. to gain additional contracts and expand on contracts/bids already received on her spreadsheet. We will receive an update from her in the next couple of months.

Membership, Bryan Erslan

Bryan reviewed his written report (see Attachment A)

As of today SASFAA has 123 paid members. Heather Boutell asked about the progress of the membership brochure and Bryan indicated that it has not progressed at all. He indicated that it should be finished before the conference.

REPORT OF OFFICERS cont'd

Past President, Keith Reeves

Keith reviewed his written report (see Attachment A)

Keith made a note that one computer was sufficient for voting at the conference.

Sandy Neel recessed the meeting at 10:15 am for a 15 minute break. The meeting reconvened at 10:39 am.

STATE PRESIDENT REPORTS

Virginia, Heather Hollandsworth

Heather reviewed her written report (see Attachment A)

Tennessee, Sandra Rockett

Sandra reviewed her written report (see Attachment A)

COMMITTEE REPORTS cont'd

Vendor/Sponsor, Dewey Knight – conference call at 10:45 am

Dewey reviewed his written report (see Attachment A)

Dewey stated that we needed to put an “Under Construction” section on the sponsorship page for the conference for Jacksonville items are still there from the Louisville conference. Please make Dewey aware of any sponsorship opportunities that you are aware of in your respective states. Dewey will put an RFP out in September for drayage services. Karen Koonce is the only volunteer that has expressed interested for the sponsorship committee.

Dewey wants to continue discussions from the February meeting in Louisville. Dewey mentioned the sponsorship policy information in the P and P which was included in the report attachments.

Recommendation – pp 6.16 – if you are going to exhibit at the SASFAA conference, you must be a member. Another layer under that discusses who can be a member in SASFAA. That excludes a group of potential exhibitors that are not related to what we do in higher education. Do we want to include these types of vendors or do we not?

Potential replacement of pp 6.16 SASFAA 2010-2011 Proposed Sponsor Info.rtf – There are three packages proposed by the sponsorship committee. Realignment of some of SASFAA’s charges. Recommends removal of the requirement that you have to be a member.

Action Item: Keith moved to approve the recommendation of new sponsor policy from the Vendor/Sponsor chair as presented with recommendation that packages be called Packages 1, 2, and 3. Nathan seconded. Motion passed unanimously.

Exhibitors – do they have to be members? Review Dewey’s Policies related to sponsorship for P and P sections regarding members and exhibiting sections. We will put together an ad-hoc committee including Sandy, Brad, Runan, Marian, and a few to examine this policy about not having to require exhibitors to be members. Do we consider adding a surcharge to vendors who choose not to exhibit and attend the conference?

Look at our membership policies – what about allowing individuals from outside the SASFAA region to attend (they do not meet the membership requirements) – Heather Boutell

STATE PRESIDENT REPORTS cont'd

South Carolina, Jeff Holliday – was absent

Jeff’s written report is included in the attachments (see Attachment A)

North Carolina, Paul Coscia

Absent – no report submitted

Mississippi, Donna O’Quinn

Donna reviewed her written report (see Attachment A)

Sandy Neel recessed for lunch at 11:54 am. The meeting will reconvene at 1:01 pm.

Brad talked to Dewey via phone and said that he was very flexible about the ad-hoc committee meeting tonight to discuss “flea-market” vendor prices. Brad mentioned maybe having a different pricing structure for these types of vendors thus not complicating the membership structure at all.

STATE PRESIDENT REPORTS cont’d

Kentucky, Dave Cecil

Dave reviewed his written report (see Attachment A)

Georgia, Doug Tanner

Doug reviewed his written report (see Attachment A)

Florida, Nathan Basford

Nathan reviewed his written report (see Attachment A)

Alabama, Amanda Sharp

Amanda reviewed her written report (see Attachment A)

COMMITTEE REPORTS cont’d

Budget and Finance, Marian Huffman

Marian continued to review her written report (see Attachment A)

Marian reviewed the proposed 2010-2011 budget that was sent out to the members (see Attachment B)

Marian passed out a new working budget from the ad-hoc committee last night to the executive board. She went over the income numbers and how they were derived at. Discussion took place. Brad has talked about creating an excel spreadsheet where everyone will be responsible for entering their expenses against a budget column that Marian will monitor as budget and finance chair. Everyone will need to monitor their budgets closely. As the recommended budget stands now, SASFAA would spend approximately 27% of our reserves to cover the 2010-2011 budget. With the exception of professional advancement, conference, etc. the remainder of the budget is approximately \$38,000.00. We have also discussed possibly doing NAOW at the Hyatt Regency in case we really do get penalized the \$80,000 so we can actually get something for the money. There are still questions we cannot answer right now.

Brad discussed the fact that there is nothing in the P and P that says the Board has to approve a budget at this meeting – just that a budget has to be presented. Heather – what are some of the things that we can do to possibly lower some of the travel items?

Sandy Neel recessed the meeting for a break at 2:09 pm. The meeting was reconvened at 2:44 pm.

Sandy Neel asked that everyone check their schedules to see when we are available for a conference call. Ron Day will work with a calendar system to set this up for everyone to reply regarding their scheduled commitments.

Brad proposed that we send out the spreadsheet regarding the budget exercise. The Board will take a look at having a conference call in two weeks to discuss the budget. What are some of the options? Eliminate GAP meeting? Eliminate LRP meeting face-to-face? Eliminate or reduce the number of rooms paid for by SASFAA at the conference?

Marian mentioned due to the Budget and Finance Committee – is not having the ability to approve a contract of \$1000 or more good or not? The GAP committee recommended that any contract of \$1000 or more should be reviewed by the Executive Board due to fiduciary responsibility.

Marian will come up with a statement of revision to the P and P regarding signing contracts of \$1000 or more, amendments to contracts, etc. for the Board to review tomorrow.

Keith Reeves discussed SASFAA charging for job postings on ATAC to produce revenue – possibly \$2500 or more. Jeff Dennis – another revenue producer is the potential of not giving any comp’d registrations to SASFAA elected officers etc. Do we charge for electronic payments?

Section 8.3.1 – Joe and Keith will write up a proposal regarding charging for job postings

COMMITTEE REPORTS (continued)

Legislative Relations, Bill Spiers

Bill reviewed his written report (see Attachment A)

Committee Members –

Florida – Marguerite Jacobs – Rollins College

Georgia – Lee Ann Kirkland – Armstrong Atlantic State University

Kentucky – Shelley Park – Eastern Kentucky University

Mississippi - ?

North Carolina – Amy Berrier – UNC Greensboro

South Carolina – Forrest Stuart – Furman University

Tennessee – Ron Gambill – EdSouth

Virginia – Mike Hawkes - ECMC

Electronic Services, Joe Dobrota

Joe reviewed his written report (see Attachment A)

Newsletter, Ben Baker

Ben was absent – see written report in attachment (see Attachment A)

2020, Runan Pendergrast

Runan reviewed her written report (see Attachment A)

LIAISON REPORT

Agency/Lender, Janet Nowicki

Janet reviewed her written report (see Attachment A)

SPECIAL APPOINTEE REPORTS

Long Range Planning, Ron Day

Ron reviewed his written report (see Attachment A)

Leadership and Mentoring, Heather Boutell

Heather reviewed her written report (see Attachment A)

Sunday, August 8, 2010

President Sandy Neel reconvened the meeting at 9:05 am

UNFINISHED BUSINESS

Guide to Financial Management 4.4Section 5 – Proposed new language in red...

Only the President of SASFAA may sign a contract on behalf of the Association. **All contracts meeting any of the following parameters must be approved by the Board before being signed by the President:**

- a. Any agreement obligating SASFAA to a liability of \$5,000 or greater.
- b. Contracts for Board Meetings, Conferences, and Workshops (e.g., Summer New Aid Officer's Workshop, etc.). Subcontracts which were considered under the original proposal and are within the events overall budget do not require additional approval.
- c. Addendums to previously approved contracts that require signature.

Action Item: Brad Barnett moves to accept proposed changes to Guide to Financial Management. Amanda Sharp seconded. Motion passed unanimously.

Membership policy – Vendor/Sponsor policy. Call Dewey back at the same number on Sunday morning at (662) 915-1166. New category – external marketers. Section 6.16.1 in the P and P. Proposed policy below (changes in red)...

SASFAA Training Activities and Advertising Opportunities

Note: First-time exhibitors, excluding External Marketers, at the 2011 Conference shall receive a discount of 25% off the below Exhibitor Fees and Training Packages. Contact the Sponsorship chair for more information.

Training Packages

Package 1
\$6000
2 Conference Exhibit Booths
Priority Booth Location (by date)
On-line Conference Support Recognition
Web Banner Ad for Fiscal Year
1/2 Page Ad in All Newsletters
1/2 Page Ad in NAO Workshop Program
New Aid Officers Sponsorship
Mid-Level Workshop Recognition

By purchasing this package, you will save \$2400 on your total package versus sponsoring each item individually. All items listed in the package are training activities and/or advertising opportunities.

Package 2
\$5000
Conference Exhibit Booth
On-line Conference Support Recognition
Web Banner Ad for Fiscal Year
1/2 Ad in All Newsletters
1/2 Ad in NAO Workshop Program
Mid-Level Workshop Recognition

By purchasing this package, you will save \$1400 on your total package versus sponsoring each item individually. All items listed in the package are training activities and/or advertising opportunities.

Package 3
\$3500
Conference Exhibit Booth
On-line Conference Support Recognition
Web Banner Ad for Fiscal Year
1/4 Ad in Two Newsletters

By purchasing this package, you will save \$600 on your total package versus sponsoring each item individually. All items listed in the package are training activities and/or advertising opportunities.

Conference Sponsorship Opportunities

~~Our annual training conference will be held February 13—16, 2011, at the Hyatt Regency Jacksonville Riverfront in Jacksonville, FL. Information regarding room reservations may be found at the conference section of our website (when available). Information about set-up times, shipping and drayage will be sent to the primary contact listed.~~

The annual training conference is open to all persons located within the SASFAA region or those doing business in the SASFAA region. The training conference is intended to provide topical discussions and training for financial aid professionals and those persons serving financial aid professionals.

- Conference Exhibit Booth \$2000
- Booth, location determined by vendor/sponsor chair, with notable exception outlined below in high visibility booth location policy.
 - All exhibitors must register for and pay conference registration fees in order to exhibit and attend conference activities.
 - Recognition of conference exhibitors will be listed in the conference program, alphabetical by company name and on the SASFAA website from the end of the conference to the end of the fiscal year. Exhibitors will be given the opportunity to opt out of this at their own discretion.

Priority Location \$500

- Must be a conference exhibitor
- Entitles exhibitor to pre-select a booth location based on drayage company blue line layout
- High visibility booth locations will be honored by dollar amount contributed and then in order of date that web-based sponsor form is completed.

Extra Exhibit Booth \$500

- Must be a conference exhibitor
- Entitles exhibitor to a second booth contiguous to original booth,
- Additional booths may be purchased at the same rate as the second booth
- Double booths may be limited due to space availability
- Double booths will be honored in order of date that web-based sponsor form is completed.

External Marketers Booth \$500

- Exhibitor that do not have financial aid, post secondary education, or higher education at the core of their mission
- All External Marketers must be approved by the vendor/sponsor chair, who has the authority to determine if the organization meets the criteria for this category
- The SASFAA Board reserves the right to refuse an External Marketer’s request to exhibit at the conference
- External Marketers are not permitted to be SASFAA members
- External Marketers may not attend conference functions without paying an additional fee, which will be determined by the board
- Booth location will be at the discretion of the vendor/sponsor chair, with priority consideration being given to exhibitors with financial aid, post secondary education, or higher education at the core of their mission
- External Marketers are responsible for any costs associated with vending
- Exceptions to this policy must be approved by the vendor/sponsor chair and president

[] Non-Exhibit Conference Support \$1500

- All conference supporters who wish to attend the conference must register for and pay conference registration fees in order to exhibit and attend conference activities.
 - Recognition of conference supporters will be listed in the conference program, alphabetical by company name and on the SASFAA website from the end of the conference to the end of the fiscal year. Supporters will be given the opportunity to opt out of this at their own discretion.

[] On-line Conference Support Recognition \$500.00

Listed alphabetically on conference on-line registration Web page with hyperlink to supporter’s Web site. Must be an Exhibitor or Non-Exhibit Conference Supporter to qualify for this recognition.

Non-Conference Training Activities

[] New Aid Officers Workshop \$1000

Recognition of conference supporters will be listed in the training program, alphabetical by company name. Supporters will be given the opportunity to opt out of this at their own discretion.

[] Mid-Level Workshop \$1000

Recognition of conference supporters will be listed in the training program, alphabetical by company name. Supporters will be given the opportunity to opt out of this at their own discretion.

Advertising Opportunities

[] New Aid Officer Worskhop Ad \$500 Half Page

- Ads will be black and white and content is provided by advertiser
- Placement of ads will be at the discretion of the Vice President
- Ads may be limited due to space and will be honored in order of date web-based sponsor form is completed

News letter Ads

- Ads will be in color and content is provided by advertiser
- Placement of ads will be at the discretion of the Newsletter Editor
- Ads may be limited due to space and will be honored in order of date web-based sponsor form is completed
- Ad Copy should be sent to the Newsletter Editor by the 10th day of the month preceding the publication date.

Full Page Newsletter Ads \$500/ Issue
 Fall Issue
 Winter Issue
 Spring Issue
 Summer Issue

Half Page Newsletter Ads \$300/ Issue
 Fall Issue
 Winter Issue
 Spring Issue
 Summer Issue

Quarter Page Newsletter Ads \$200/ Issue
 Fall Issue
 Winter Issue
 Spring Issue
 Summer Issue

Newsletter Editor

Please send digital ad copy and web link to:

Web Banner Ad \$1200 for Fiscal Year

- Ads will be in color and content is provided by advertiser
- Placement of ads will be at the discretion of the Electronic Services Chair

Action Item: Sandra Rockett moved to accept the proposal as presented by Brad Barnett. Brenda Burke seconded. Motion passed unanimously.

NEW BUSINESS

Approval of Committee Members – make sure all committee members pay their membership dues and complete the membership forms

Action Item: Nathan Basford moved that all committee members presented to the Board be approved contingent on the members having paid their SASFAA dues. Keith Reeves seconded the motion. Motion passed unanimously.

Discussion of SASFAA Conference Rates

Action Item: Brenda Burke made a motion to leave the conference fee at \$250 for the 2011 SASFAA Annual Conference. Donna O’Quinn seconded the motion. Motion passed unanimously.

Action Item: Dave Cecil made a motion to make a daily conference rate of \$150 for 2011 SASFAA Annual Conference. Nathan Basford seconded the motion. Motion passed unanimously.

Marian discussed eliminating the PC lab at the SASFAA Annual Conference which comes to a savings of \$10,000. Brad also discussed trying to balance the budget down to the \$80,000.

We need all information from board members by Friday regarding the budget exercise so we can try to have a conference call in two weeks regarding the budget.

Keith Reeves proposed a change to the P and P section 9.2 on Awards. The Past President has been restricted by the P and P on obtaining award plaques at the same business. Keith suggested revising section 9.2 (page 57) to allow the Past President flexibility in this matter. Suggested new language (new text in red)...

9.2 Awards Officers of the Association shall be presented with plaques upon completion of terms of service. The president shall make the presentations at a place and time deemed appropriate. ~~Currently~~ **Historically** plaques are obtained through the following company that retains the SASFAA logo **(although not required)**.

Action Item: Keith Reeves made a motion to accept the proposed language for section 9.2 awards. Jeff Dennis seconded. Motion passes unanimously.

Action Item: SASFAA November Board Meeting via Conference Call

Did not discuss.

Action Item: Nathan Basford moved to adjourn. Jeff Dennis seconded it. Motion passed.

Meeting was adjourned at 10:45 am.

**ATTACHMENT A
BOARD REPORTS
Hyatt Regency Jacksonville Riverfront
August 6-8, 2010**

President Report
Sandy Neel

Summary of Activities

GAP3: The President should ensure that all committees' goals and objectives for the year concur with the LRP and the recommendation of the most recent GAP Report.

By each Committee Chair completing the Goals and Objective spreadsheet and submitting Board reports in the format consistent with our current practice, this should be a fairly easy task. At each Board meeting reports will be presented to the Board and open to discussion.

LRP14.7: Committee goals and objectives should be developed annually to meet the goals of the SASFAA Long-Range Plan and incorporate recommendations from the most recent Governance and Planning (GASP) report.

Goals and objectives were sent out to each member of the Board to develop before the first Board meeting. A copy should be sent to Sandy by September 1.

PP 6.0 a: 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.

Goals and objectives were sent out to each member of the Board to develop before the first Board meeting. A copy should be sent to Sandy by September 1.

LRP4.4: Pursue alternatives to on-site meetings whenever possible to keep costs at the most reasonable level. Such alternatives include conference calls, electronic mail and arranging committee meetings in conjunction with other meetings where some committee members would normally be in attendance.

The November Board meeting will be held via conference call.

GAP 5: Conduct the November Board Meeting via Conference call

We will hold the next Board Meeting via conference call however it will need to be a series of shorter call and not an all day call. We need to decide dates where we can hold a series of 1 to 2 hour calls. Discussion needs to occur.

GAP 6: Maintain the discretion of the President to determine who should attend which Board meeting

For the first Board meeting, all members were invited to attend. Dewey Knight and Ron Day had previous commitments and could not attend. All Board members are sharing a room at the meeting. Those who have chosen not to share a room are paying the other half of the room cost.

PP 5.2b and LRP 9.2: Represent SASFAA as a voting member in the Board meetings of the National Association of Student Financial Aid Administrators, Inc. (NASFAA).

Sandy will attend all NASFAA Board of Director Meeting and participate in all conference calls.

At the close of the NASFAA Conference in Denver, CO on July Wednesday July 21 Sandy graduate from the "Peanut Gallery" to the big table. Keith and Heather still represented SASFAA as voting member until that time. Justin Draeger was officially introduced as the new President and CEO of NASFAA. Other staff changes were also announced at the Meeting. Discussion occurred regarding a new website design and functionality. Justin agreed that he would continue to provide weekly updates to the Board of Directors about what is going on in NASFAA and with legislation. Draeger reported that he wanted to discuss the feasibility of business programs and services such as web hosting, database management for states/regions, targeted audit services, national unbiased preferred lender lists, providing something similar to ELM to members, and professional certification. The Taskforce on Economic Growth will be looking into these additional areas to see if these "business services" would be fiscally viable. The taskforce will be looking at different ideas such as these

and then looking at outside assistance to see if they are possible. He noted that these services would require some investment and that they are not products that we could just slip into NASFAA's current structure.

The Board discussed Gainful Employment, the financial reform bill, student loan debt and default rates, Perkins Loan reform and future funding of Financial Aid.

The next SASFAA Board Meeting is in San Antonio, TX November 7-8, 2010.

Discussion

The Quote on the back of our Tent cards: "Damn the torpedoes! Full speed ahead!" is attributed to Union Navy Admiral David Farragut during the Battle of Mobile Bay August 5, 1864. I choose this quote for several reasons: 1.) Although a Union Officer, Farragut had ties to the south-he was born in Knoxville, TN; 2.) The date and location in which the Battle took place is right in line with this meeting; and 3.) the quote describes exactly what SASFAA and the Financial Aid community has gone through the last few years. ACG/SMART, DL Conversion, the end of the FFEL program, seeing many of our friends and colleagues lose their jobs due to DL, two Pells in an award year, and dwindling reserve funds have been our "torpedoes" but still we are moving full speed ahead.

Although we are still facing many of the same challenges, I feel this Board will make some significant changes this year to put SASFAA back on solid ground. I look forward to working with each and every one of you as we go through this process. There will be times that we will not agree on everything but I ask that each of us not take it personally and for us to conduct business in a professional and courteous manner. We all want what's best for this organization and the membership.

President-Elect's Report Brad Barnett

Summary of Activities

LRP 3.5: Ensure that committee chair appointments, to the extent possible, reflect inclusiveness.

Activity: Committee Chair appointments for 2010-11 are doing by the current President. This objective will be met when appointments are made for 2011-12.

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

Activity: Committee Chair appointments for 2010-11 are doing by the current President. This objective will be met when appointments are made for 2011-12.

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 cost.

Activity: The President-Elect has joined the Organizational Structure subcommittee of the Long Range Planning Committee to review this topic, with the anticipation of implementing changes during the 2011-12 year.

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.

Activity: Committee Chair appointments for 2010-11 are doing by the current President. This objective will be met when appointments are made for 2011-12.

LRP5.1: Identify and finance one individual annually, other than the President-elect or Treasurer, to attend the NASFAA Leadership Conference if never attended previously.

Activity: The feasibility of this will be determined in large part by the 2010-11 SASFAA budget, which has not been established at this time.

PP 5.31: Selects committee chairs and members prior to the transitional Board meeting using the volunteer form.

Activity: Committee Chair appointments for 2010-11 are doing by the current President. This objective will be met when appointments are made for 2011-12.

PP 5.32: 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: This will be done.

PP 5.33: Represents SASFAA at selected SASFAA affiliated state meetings.

Activity: This will likely not be done during the 2010-11 year due to budget constraints. It is very likely that other Executive Board or Committee Chairs who will already be attending the respective state meetings will also serve as the SASFAA representative and provide the SASFAA update.

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

Activity: This will be done very judiciously as SASFAA is still attempting to determine an accurate way to predict future vendor/sponsor income based on the legislative changes that have eliminated FFELP, and consequently the major contributors to vendor/sponsor income received by the association.

PP 5.35: Reviews the Manual and makes recommendations for changes to the Board or the appropriate committee.

Activity: This will be done.

PP 5.36: Begins initial planning for the next annual conference and for the promotion of the event.

Activity: Laura Diven-Brown has accepted the request to be the Conference Chair for the SASFAA 2011 Annual Conference and is currently serving as a member of the 2010 Annual Conference Committee.

PP 5.37: Serves as parliamentarian to the Board.

Activity: This will be done.

PP 5.38: Conducts an orientation session at the annual conference for state presidents-elect.

Activity: This will be done.

PP 5.39: Advises and counsels the president as needed.

Activity: This will be done.

GAP 10: The President-Elect Elect should attempt to select committee chairs prior to the first Board meeting. Where possible, these individuals should serve as their respective state representatives to the committee.

Activity: Committee Chair appointments for 2010-11 are doing by the current President. This objective will be met when appointments are made for 2011-12.

GAP 4: A form, which should include name, institution, state, institution type, whether new or returning, gender, and ethnicity, should be developed by the President-Elect and given to all Committee Chairs and distributed to all committee members prior to the first Board meeting of the Fall. The form will then be returned and provided to the Board in completed fashion prior to the next Board meeting

Activity: This has been accomplished and the form is on-line versus paper, in order to expedite the completion process and provide ease in compiling and archiving the data.

GAP 60: The President-elect should begin budget formulation after the annual conference and preliminary budget should be presented at the transitional Board meeting for discussion and review

Activity: At this point a site for the 2011 Annual Conference has not been selection, so the early stages of formulating the budget cannot happen at this time.

GAP 7: Consider the possibility of starting some transition training at the annual conference.

Activity: This will be considered.

Discussion

One of the big issues to be considered at this time is the site for the 2011 conference as this will have major implications on the association's budget as we move forward.

Vice-President's Report Brenda Burke

Summary of Activities:

GAP 13: Continue to develop opportunities to mentor mid-level aid administrators. Continue the practice of having a mid-level type experience at the annual conference similar to that offered at new aid officers. Another possibility would be to have a mid-level workshop in conjunction with other state conference as this may increase attendance and reduce costs.

Activity: Researching idea of having workshops in conjunction with state conferences.

GAP 50: Continue to provide outstanding training by experienced aid administrators at the NAOW at accessible and affordable sites/ LRP 12.1: Continue to provide an annual, comprehensive training workshop to provide new aid administrators with the basic framework of knowledge to administer student financial assistance programs/ PP6.144: Coordinate a summer workshop for new aid instructors.

Activity: Planning is already under way for the 2011 NAOW. In communication with President and Site Selection Chair about dates and site selection checklist. The curriculum coordinator has been selected and returning instructors have noted their intention to return. In communication with potential new instructors to assure all states and sectors are being represented. The returning lender reps have not been able to commit to a second year as changes happen in their industry. I have secured two new lender reps. Working on securing lender reps that have experience with workshop to provide continuity. Have secured alternate instructors in case workshop size is large and an additional classroom is needed. Lender rep positions have not been filled due to the uncertainty of the loan program.

LRP 12.10: Identify experienced members to serve as faculty for planning and conducting professional development programs for the Association.

Activity: Have had discussions with experienced members of the Association and have received a list of members that are willing to serve as Instructors if needed.

Gap 49: A summary and evaluation report of the NAOW should be presented to the Board during the first meeting of the year.

Activity: 91 evaluations were received from event. Overall good rating of NOAW from participants. Lowest scores on sleeping facilities and highest scores on staff knowledge.

PP 6.143: Identify locations and develop schedules for training activities./ LRP 12.11: Choose training sites which are accessible, affordable, and educationally suitable (or enhance the educational experience)

Activity: Working with Site Selection Chairs to find a location that is accessible, affordable, and well equipped for instruction purposes.

PP6.141: Construct a preliminary budget proposal with assistance from the finance and audit chair.

Activity: Will determine budget for all Professional Advancement activities for 09-10 with great assistance from the aforementioned, as well as the SASFAA President and Treasurer.

Discussion:

NAOW Training:

Bryan Erslan, Lincoln Memorial University, has agreed to serve as the Curriculum Coordinator. The returning instructors have confirmed their intent to return. Currently working on confirming new instructors and one additional returning instructor.

Curriculum Coordinator: Bryan Erslan- TN, Returning Instructors: Donna Taylor- VA, Cynthia Grant- NC, Lender Representatives: Jeanne Holmes- Suntrust (VA), Dana Kelly – Nelnet (NC), Chansone Durden- TG (FL), Alternate Instructors: Tabitha McAllister- SC, Runan Pendergrast- KY, Brent Tener- TN

Summary of Activities

PP5.74 Ensure that the annual evaluation is completed and report made to the Board.

Activity: The Governance and Planning (GAP) Committee will review progress toward the goals as set forth in the Long Range Plan during the year and provide a year-end evaluation and recommendations. The committee will meet via teleconference during the Fall to evaluate the New Aid Officer Workshop held in June 2010, and meet in April for the year-end review.

PP5.67 Serve as a SASFAA voting representative to the NASFAA Board of Directors.

Activity: I attended the NASFAA Conference in Denver, CO, July 9-10, 2010, as a regional voting member of the board.

PP6.129, PP6.131, PP6.133, PP6.134, PP6.135 Present a slate of candidates in accordance with the election schedule or calendar for president-elect, secretary, treasurer and vice president to the Board.

Activity: The Nominations and Elections committee, consisting of the Immediate Past State Presidents (or designee) and the Past SASFAA President, will meet via conference call in October and present a slate to the board at the November meeting. Information will be posted to the SASFAA Web site and in the first SASFAA Newsletter.

PP6.2 Solicit nominations for Association awards and present the recommendations to the Board for approval.

Activity: The Awards committee, i.e. the SASFAA Executive Committee, will meet at the November board meeting to approve nominees for SASFAA Awards. Information regarding the criteria for awards will be posted to the SASFAA website and in the first SASFAA Newsletter. The current state presidents are encouraged to ask that this information be posted in their state newsletters as well.

Discussion Items

NASFAA

My last official capacity representing SASFAA as President was at the NASFAA Board of Directors' Meeting held immediately prior to the NASFAA Conference in July. SASFAA was well represented with Ron Day, Barry Simmons, Lisa Tumer, Brad Honious, Heather Boutell and me all as voting members and Dave Mohning, Sandy Neel, and Billie Jo Hamilton as non-voting members. Joining me on next year's Board will include Ron, Barry as Past National Chair, Lisa, Sandy, Brad, and Billie Jo as voting members of the board, and Dave Mohning and Brad Barnett as non-voting members.

Exciting news during the business meeting at the NASFAA conference was the announcement of Brent Tener as the SASFAA recipient of the NASFAA State and Regional Leadership Award.

President's Annual Report

The President's Annual Report for 2009-10 should now be posted to the Web site.

2010-11 Committees:

The following members will serve on the Nominations & Elections Committee: Andy Weaver (AL), Rebecca Lydick (FL), Jill Rayner (GA), Chester Priest (KY), Searcy Taylor (MS), Lisa Koretoff (NC), Hank Fuller (SC), Marian Huffman (TN), and Shelia Nelson-Hensley (VA).

The following members will serve on the Awards Committee: Sandy Neel, Brad Barnett, Jeff Dennis, Brenda Burke, Amy Berrier, Amanda Sharp (AL), Nathan Basford (FL), Doug Tanner (GA), Dave Cecil (KY), Donna O'Quinn (MS), Paul Cosia (NC), Jeff Holliday (SC), Sandra Rockett (TN), and Heather Hollandsworth (VA).

The following members are recommended for approval to serve on the Governance and Planning (GAP) Committee: Returning members: Zita Barree (VA), Sharon Oliver (NC), Lester McKenzie (TN). Two new members will be added and Brad Barnett (VA) will participate in his capacity as President-Elect.

Secretary
Amy Berrier

Summary of Activities

GAP26, PP 6.0g: Maintain the records of the Association.

Activity: The Secretary will keep documents in an electronic format, which will ensure records can be archived electronically at the end of the year.

GAP25: The membership of the Association should represent the composition of financial aid professionals in the region.

Activity: The membership database will be archived at year end in excel or some other format for ease of determining persistence and other membership statistics. The Secretary will coordinate this with the membership chair after June 30th.

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

Activity: The Secretary will review the current language in the SASFAA Policy and Procedure Manual has procedures regarding archives and provide suggested updates if necessary, periodically review the methods for maintaining accessibility, retrieval, security and the location for archival of records, record and distribute the proceedings of the Board and general business meetings, and prepare and submit meeting minutes with supporting documents and publications, including annual conference programs, special reports, and membership directories to archives.

PP 5.6i: Orders and distributes the Association's official stationery.

Activity: This is not necessary, as the association's stationary is now electronic. An updated version of the stationary has been created by the Secretary and distributed to the appropriate individuals.

PP 5.6k: Sends appropriate cards and gifts to members and colleagues on behalf of the Association. Maintains the banner and seal.

Activity: The Secretary sent a card to Joe McCormick and Glenn Shumpert.

The Secretary maintains the seal, but does not store the banner.

PP 5.6a: Facilitates meeting arrangements, including lodging, meal functions and meeting rooms for Board meetings.

Activity: The Secretary will work with the President and Site Selection Chair to handle this.

PP 5.6j: Prepares and distributes agendas in advance of Board meetings.

Activity: The President prepares the agenda and gives to the Secretary to distribute to the Board prior to each meeting.

PP 5.6f and PP 6.41: The By-Laws will reflect the mission, vision and purpose of the Association and support the viability of the organization.

Activity: The bylaws committee, chaired by the secretary, annually reviews bylaws governing the Association. The bylaws committee recommends necessary changes to the Board.

The following individual submitted volunteer forms signifying an interest in serving on the By-Laws Committee. I am submitting their names to the Board for review, discussion, and approval if deemed appropriate:

- Jane Kanipe, North Carolina State Education Assistance Authority (Agency) - New
- Tom Morehouse, VirginiaCAN (Agency) - New
- Vickie Montgomery, Spalding University (Kentucky – Independent 4 Year) - Returning

Treasurer's Report
Jeff Dennis

Summary of Activities

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

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

GAP 56: Fiscal integrity will be ensured. Recommend that quarterly budget statements continue to be posted on the SASFAA Web site.

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

GAP 57: Fiscal integrity will be ensured. The budget should be adjusted according to the prescribed standards when budget limits are exceeded.

Activity: When budget lines are exceeded the treasurer is contacting the president for overrides and staying in compliance with the Policies and Procedures.

GAP 61: The future financial stability of the Association is provided through careful and regular planning and evaluation. An expenditure history should be provided to each committee chair and Board member for review and analysis. Once finalized, a detailed listing should be given to each member noting specific expense categories.

Activity: Quarterly reports are sent from Quickbooks to officers and committee chairs.

GAP62: Recommend continuation of the use of a CPA firm to assist with the completion of the 990 and 990T. Using an outside company for preparation of the 990 and 990T has allowed the Association to stay current with non-profit requirements for filing taxes.

Activity: Fiscal integrity will be ensured by utilizing assistance from an accounting firm in the completion of 990 and 990T forms.

GAP63: Recommend that quarterly budget statements continue to be posted on the SASFAA Web site.

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

GAP 65: The future financial stability of the Association is provided through careful and regular planning and evaluation. All contractual obligations that exceeds \$1,000 should be approved by the Board.

Activity: The treasurer will watch for contracts that exceeds \$1000 and apprise the president.

LRP13.2: Review the SASFAA Guide to Financial Management periodically to ensure the continuity of sound financial practices.

Activity: Ensure fiscal integrity through periodical review of SASFAA Guide to Financial Management.

LRP14.2: Determine the appropriateness of fees assessed for dues, the annual conference, workshops and ancillary services including vendors, at least once every five years.

Activity: Appropriateness of Associated fees will be assessed every five years.

LRP14.2: Provide for the establishment, maintenance, investment, and monitoring of a sufficient Associational reserve fund.

Activity: Reserve fund is set up and maintained sufficiently.

LRP14.4: Review routinely all risks and liabilities affecting cash management and contractual obligations.

Activity: Cash management and contract obligations are reviewed routinely to alleviate associated risks.

LRP14.5: Determine the appropriate cash balance to be brought forward annually.

Activity: Has been evaluated.

LRP14.6: Incorporate the financial impact of vendor sponsorship in the budget planning process annually.

Activity: Implications of vendor sponsorship are accounted for in annual budgeting and planning.

PP 5.44: Fiscal integrity will be ensured. Receives and disburses monies of the Association.

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

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.

PP 5.54: Submits financial reports to the Board at each meeting and the annual business meeting.

Activity: Financial reports are submitted to the proper recipients and in conjunction with annual business meetings.

PP 5.55: Arranges in coordination with the finance and audit chair for an annual independent audit of the financial records.

Activity: Arrangements are being made for an annual independent audit to be conducted of the association's financial records.

PP 5.56: Files IRS for 990 for the fiscal year by the prescribed deadline, currently October 15, and all financial reports in a proper and timely manner.

Activity: In order to ensure fiscal integrity, IRS submissions are filed in a proper and timely manner.

PP 5.57: Sets up master accounts and obtains credit for the Association as appropriate.

Activity: Banking accounts are appropriately handled for the Association by the Treasurer.

PP 5.58: Maintains adequate and appropriate records of receipts and expenditures.

Activity: Receipts and expenditure records are adequately maintained.

PP 5.59: Prepares annual year-end financial statements as of June 30.

Activity: Annual statements are prepared by June 30.

Budget and Finance's Report Marian Huffman

Summary of Activities

GAP 16, GAP 58 & LRP 5.1: Continue to send the President-elect and others when financially feasible to the NASFAA Leadership Workshop.

Activity: The budget and finance committee allocated resources to the President-Elect budget line item to fund the NASFAA Leadership Workshop. Due to budget constraints other member attendance is not feasible.

GAP 17 & LRP 5.2: Continue the inter-state visit program, and inter-regional visits as funding is available.

Activity: Due to budget constraints funding is not feasible.

GAP 62 & PP 6.35: Recommend continuation of the use of a CPA firm to assist with completion of the 990 and 990T. Work with the treasurer to ensure that all financial reports including tax return are filed by established deadlines.

Activity: Mike Dunn of the Blankenship CPA firm has been contacted to begin the 2009 federal tax return. Jeff Dennis has responded to all questions. The 990 & 990T has been completed. This requires signature from President Neel prior to being mailed to the IRS.

GAP 65, GAP 76, LRP 14.2 & LRP 14.3: Continue as possible, building the unrestricted reserves of the Association. Recommend the restricted and unrestricted accounts be reported separately.

Activity: Reviewed the current reserves and the last three years operating expenditures.

Current reserve funds total \$452,941 and the most recent operating budget (09-10) was \$385,015. The proposed operating budget for 10-11 is within GAP guidance. Funds earmarked for SASFAA endowment are noted and the earnings from interest are reported on a separate worksheet maintained within the spreadsheet.

Due to the reduction of reserves over the past several years, the committee will review the feasibility of continuing the endowment.

The committee will review the recommendation from the 09-10 GAP report to require all contracts or amendments to contracts with a financial obligation over \$1,000 to require board approval.

GAP 68: Review policies regarding complimentary registrations and lodging incurred at required events by Board and Committee members.

Activity: The committee will review prior year room comps and make recommendations as needed.

GAP 69 & LRP 14.4: Review and update as necessary SASFAA event contracts. Review all risks and liabilities affecting cash management and contractual obligations.

Activity: A copy of SASFAA's current contractual obligations is attached.

LRP 5.6: Provide a scholarship to award a need-based student at the Institution of the Past-President

Activity: Appropriate \$500 funds in the line of Past President to meet this obligation. Due to budget restraints, it is recommended that the scholarship be reduced from the traditional \$2,000 to \$500.

LRP 14.5 & LRP 14.7: Determine the appropriate amount of cash to be brought forward. Incorporate the impact of vendor/sponsor income on the budget.

Activity: To be presented with the 2009-10 budget proposal.

PP 6.37: Prepare in collaboration with the president and treasurer the fiscal budget.

Activity: Present the draft 2010-2011 budget and recommend approval.

Other Items

Conflict of Interest Policy The policy will be presented at the August meeting. Each executive board and committee member should sign and return to Marian Huffman for retention.

Budget and Finance Transition Chris Tolson traveled to Cleveland, TN on June 22 to transition/train the new budget and finance chair, Marian Huffman. The organizations historical records were delivered and are currently being stored at the home of Marian Huffman. The committee will review these documents and determine an appropriate plan for storage.

SASFAA, Inc.
Hotel Contracts
7/22/2009

**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 (adjusted for 2009 to 43 min = 39 rooms)

90% of 45 guest room commitment = 41 room s (adjusted for 2009 40 min rooms = 36)

SASF AA can reduce guest room commitment by 10% 30 days prior to arrival date

\$1,800 minimum food and beverage commitment - SASF AA owes difference in actual vs minimum (adjusted to \$1,000 for 2009)

145(50 on Thursday and Friday and 45 on Saturday) room nights (@\$220.89 - \$199 plus \$21.89) = \$32,029 (for 2009 \$22,672)

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 \$ 9,807

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

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

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

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

1000 minimum room nights – room rate is \$159 plus 13% tax = \$159,000

Rooms – 100% of group rate unused

Catering Minimum \$45,000 – SASF AA owes difference in minimum vs actual used

Reduction Resale Clause:

\$80,600 if hotel does not sell room and/or recover food & beverage difference of \$45,000

Deposit – 30% of estimated food/beverage, audio visual – due 30 day prior – 1/10/2011 (estimate \$13.500)

Total liability as of may 18, 2010 Liability changes based on individual contracts and timing \$273,429

SASF AA, Inc. Investments 6/22/2010

Holding Company	Account #	Purchase Date	Amount	Interest Accrual	Term	Maturity Date	Rate	Interest Payment Schedule	Current Estimated Value
Irwin UN Bk & Tr Co	DFL006262	9/29/2008	\$50,000	n/a	24	9/28/2010	1.49%	Paid Semi-Annual to Checking Account.	\$50,172
Haven Tr. Bank* St. Augustine FLA	DFL006262	12/7/2007	\$65,000	n/a	36	12/7/2010	4.40%	Paid Monthly to Checking Account	\$66,455
River Cities Bank	DFL006262	4/24/2008	\$25,000	n/a	36	5/2/2011	3.74%	Paid Monthly to Checking Account	\$25,727
Evergreen State Bank	DFL006262	6/11/2008	\$50,000	n/a	36	6/20/2011	3.96%	Paid Monthly to Checking Account	\$51,744
Suntrust Bk Atlanta	DFL006262	9/29/2008	\$45,000	n/a	36	9/29/2011	6.6% **	Paid Monthly to Checking Account	\$46,166
American Express Centr n	DFL006262	3/17/2010	\$50,000	n/a	24	3/19/2012	1.25%	Paid Semi-Annual to Checking Account.	\$49,910
CapMark	DFL006262	7/9/2009	\$50,000	n/a	36	7/16/2012	2.60%	Paid Semi-Annual to Checking Account.	\$50,937
MidFirst Bank *	DFL006262	7/9/2009	\$50,000	n/a	36	7/16/2012	2.55%	Paid Monthly to Checking Account	\$50,884
Leaders BK Oak Brook ILL	DFL006262	6/16/2010	\$25,000	n/a	24	6/18/2012	1.00%	Paid Monthly to Checking Account	\$25,000
Total CD's			\$410,000						\$416,994

Money Market - Ridgeworth \$45,000 \$45,008

TOTAL INVESTMENTS \$455,000 \$462,002

* denotes EndowFund Accrued Interest \$1,272

Total \$463,274

Summary of Activities

GAP16: Members who possess leadership aspirations and capabilities will be identified and developed for significant involvement within the Association.

Activity:

Results:

GAP40: Apprise members of legislative issues affecting the profession, educate members of alternative approaches, encourage involvement on issues, and advocate positions when reasonable consensus exists.

Activity:

Results:

GAP41/42/43/44/45/46/47: The professional growth and competencies of members are addressed by offering workshops, seminars, meetings and other training opportunities.

Activity:

Results:

GAP69: The future financial stability of the Association is provided through careful and regular planning and evaluation.

Activity:

Results:

LPR5.4: Members who possess leadership aspirations and capabilities will be identified and developed for significant involvement within the Association.

Activity:

Results:

LRP10.5/12.13/12.7: The professional growth and competencies of members are addressed by offering workshops, seminars, meetings and other training opportunities.

Activity:

Results:

Objective/Task:

Sustain a good cross-sectional offering of sessions to address the various needs of the Association. A great number of sessions should be offered to meet the needs of seasonal professionals.

Activity:

Student Success stories should be continued as a part of the annual conference.

Activity:

All conference/workshops be self-sufficient.

Activity:

The Conference Committee should offer legislative sessions at the annual conference that “simplify” the legislative process for members.

Activity:

Stress to the membership the importance of developing and submitting session proposals.

Activity:

The Master Conference Manual is a great asset to the Association and should be reviewed by the conference chair annually.

Activity:

Continue the practice of a conference transitional meeting immediately following the annual conference to allow for immediate assessment and the potential impact of the assessment on the conference to be held the following year.

Activity:

Provide a forum at the SASFAA conference for recognition of any state project(s) submitted to NASFAA.

Activity:

Offer pre-conference workshops to reach out to specific levels or sectors of aid administrators.

Activity:

Determine the training/professional development needs of members, recognizing categorical distinctions among members such as experience, institutional type, and level of responsibility.

Activity:

Present programs and sessions possessing both vitality and relevance for all members.

Activity:

Recognize, encourage and support the development of informal networking strategies for sharing information and locating job opportunities.

Activity:

Continue to formally recognize any state that submitted a project for NASFAA awards. The GAP Committee recommends a newsletter article in summer to recognize each state that submits a project in addition to recognizing at the annual conference.

Activity:

Topics of Discussion

Chair—Brenda McCafferty

Alabama Rep—Andy Weaver

Florida Rep—Ryan McNamara

Georgia Rep—Pennie Strong

Kentucky Rep—Chester Priest

Mississippi Rep—Cindy May

North Carolina Rep—Mike Abernathy

South Carolina Rep—Aria Simmons

Tennessee Rep—Ashley Bianchi

Virginia Rep—Joe Dobrota

2012 Conference Chair—Laura Diven-Brown

Local Arrangement Chair—Monica Stam

Location: Hyatt Regency-River

Date: February 13-16, 2011

Conference Theme—Waterways to the Future: Navigation a New Course for Student Success

Charity—Wounded Warriors

Opening Key Note Speaker—June Cline
Entertainment—Billy Buchanan Band

Bingo will be back.

Business attire for president's reception and banquet, both to be held on Tuesday evening.

Preconference events – all being held at Marriott. Not sufficient space available at Hyatt.

State President's – success stories are due from each state **December 15, 2010.**

Site Selection Report
Lisanne Masterson

GOALS:

- 1) Research and present 2012 conference site options to the Executive Board, then finalize the contract negotiations with the selected site hotel.
- 2) Work with Vice President Burke to secure a site for the 2011 New Aid Officers' Workshop
- 3) Work with the Don Cesar on the 2011 Transition Board Meeting in order to minimize costs, and secure bids for future transition board meetings.
- 4) Enhance the Site Selection portion of the Conference/Site Selection Manual to include maintaining hotel pickup history, creating a comprehensive listing of possible conference sites by state, and compiling information on average air fare to/from cities within the SASFAA region.

COMMENTS:

Based on recommendations from the Budget Recovery Task Force and SASFAA Past Presidents along with the direction of President Neel, I focused on securing bids for the 2012 Annual Conference from the three centrally-located cities outside of Florida – Nashville TN, Atlanta GA, and Charlotte NC. Numerous bid requests were sent out and eight have been received to present to the Executive Board.

Membership Report
Bryan Erslan

Summary of Activities

PP 6.111: Announce the availability of the online membership form to solicit membership dues no later than July 31.

Activity: An email was sent on the SASFAA listserv on July 20 to encourage renewal of membership. This was sent to all previous members the past two years that had not renewed their membership for 2010-11.

As of July 24, there were **123** paid members for 2010-11 compared to last year on July 22, there were **128** paid members for 2009-10. Out of the 123, there were 87 new (which were most likely from the NAOW back in June and 36 renewals. (On July 18, 2008 there were **141** paid members, July 28, 2007, **317** people had paid their membership dues for 2007-08, versus **321** in 2006-07, which was recorded August 3, 2006.

903 members are in a status of extended expiration of their 2009-10 membership. These individuals will be considered "active" until August 31, at which time they must renew their membership if they wish to continue member benefits. The Membership Committee will reach out to the individual states a little later in August to try and increase memberships through the various state FAA's associated with SASFAA.

PP 6.114: 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: A complete download of the database was saved to a PC on July 24 in addition to the daily back-ups performed by ATAC.

Sponsorship Report
Dewey Knight

Summary of Activities

LRP14.7: The future financial stability of the Association is provided through careful and regular planning and evaluation. Incorporate the financial impact of vendor sponsorship in the budget planning process annually.

Activity: The Budget Recovery Task Force has reviewed SASFAA's Sponsorship Policies and Pricing and will present its recommendations for the future with respect to same at August, 2010 Board Meeting.. Continue to work closely with President, Budget/Finance Chair, Conference Chair, and Workshop Chairs to ensure adequate revenue is available to support conference, workshop, and ancillary services.

LRP14.2: The future financial stability of the Association is provided through careful and regular planning and evaluation. Determine the appropriateness of fees assessed for dues, the annual conference, workshops and ancillary services including vendors, at least once every five years.

Activity: The Budget Recovery Task Force has reviewed SASFAA's Sponsorship Policies and Pricing and will present its recommendations for the future with respect to same at August, 2010 Board Meeting.. Continue to work closely with President, Budget/Finance Chair, Conference Chair, and Workshop Chairs to ensure adequate revenue is available to support conference, workshop, and ancillary services.

PP 6.156: Disseminate quality information to enhance communications among members in a timely and cost-efficient manner. Develop materials and brochures for potential contributors.

Activity: The Sponsorship section of SASFAA Web site will be updated . A brochure to be sent to potential sponsors/exhibitors will be developed.

PP 6.161: The professional growth and competencies of members are addressed by offering workshops, seminars, meetings and other training opportunities. Contract with a drayage company and design an exhibitor floor plan for the conference.

Activity: Bids from potential drayage companies will be solicited via RFP process. The committee will work closely with Conference Chair and Site Selection Chair as well as conference hotel's event manager to ensure exhibit space at annual conference exceeds expectations.

PP 6.1610: Recognize publicly the contributions of all sponsors.

Activity: We will stress the importance of our sponsor's support in terms of time, talent, and treasure, in all communications to membership and at all association events. Photographs of sponsors will be displayed at luncheon during annual conference as well as recognition from the podium at this event.

PP 6.1611: 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: We will work with Conference Chair to ensure all sponsors are duly recognized.

PP 6.1612: All sponsors shall have an opportunity to provide a brief description about their organization to be printed in the conference programs.

Activity: I will, in collaboration with the President, Secretary and Conference Chair, ensure this task is executed in accordance with current regulations and the P&P.

PP 6.1613: A reception or some form of public recognition to honor the contributions of the sponsors, by category, will occur during the annual conference and will be coordinated by the sponsorship and conference chairs after consulting with the President.

Activity: I will, in collaboration with the President, Secretary and Conference Chair, ensure this task is executed in accordance with current regulations and the P&P.

PP 6.114: Disseminate quality information to enhance communications among members in a timely and cost-efficient manner. Special instructions regarding exhibit space and storage of materials will be mailed electronically to exhibitors in advance of the conference.

Activity: I will execute as stated.

PP 6.162: Disseminate quality information to enhance communications among members in a timely and cost-efficient manner. Each sponsor will be provided with a directory of attendees.

Activity: I will work with the Electronic Services Chair and Membership Chair to ensure accurate and timely information is available via SASFAA Web site.

PP 6.163: Policies and procedures are accurate and complete in order to provide consistent Associational direction. Review the policies affecting sponsorship and make recommendations when appropriate.

Activity: Based on the recommendations of the SASFAA Budget Recovery Task Force, execute as stated.

PP 6.164: The future financial stability of the Association is provided through careful and regular planning and evaluation. Identify activities and events for sponsorship opportunities including newsletter and directory advertisements, the annual conference, the New Aid Officers' Workshop, other training events and Board meetings.

Activity: In collaboration with the President, Conference Chair, and Workshop Chairs, I will execute as stated.

PP 6.165: The future financial stability of the Association is provided through careful and regular planning and evaluation. Prepare and mail solicitations of sponsorship opportunities to potential sponsors.

Activity: I will execute as stated.

PP 6.166: The future financial stability of the Association is provided through careful and regular planning and evaluation. Review and recommend, with assistance from the finance and audit chair, the standard advertising rates as well as any discounts offered to sponsors.

Activity: Based on the recommendations of the SASFAA Budget Recovery Task Force and in collaboration with Budget/Finance Chair, present a bundled group of sponsorship opportunities to ensure funding meets projected revenue budget. Continue to aggressively seek expansion in the number and types of sponsors.

PP 6.167: The future financial stability of the Association is provided through careful and regular planning and evaluation. Coordinate all vendor and sponsor activities and benefits.

Activity: I will execute as stated.

PP 6.168: The professional growth and competencies of members are addressed by offering workshops, seminars, meetings and other training opportunities. Serve as the liaison to the conference committee for sponsorship needs and effective use of exhibitor spaces.

Activity: I will execute as stated.

LRP14.7: The future financial stability of the Association is provided through careful and regular planning and evaluation. Incorporate the financial impact of vendor sponsorship in the budget planning process annually.

Activity: Based on the recommendations of the SASFAA Budget Recovery Task Force and in collaboration with Budget/Finance Chair, present a bundled group of sponsorship opportunities to ensure funding meets projected revenue budget. Continue to aggressively seek expansion in the number and types of sponsors.

Discussion

The Sponsorship section of the SASFAA Web site will be updated once sponsorship opportunities are finalized. Until such time, an "Under Construction" type message will be displayed. I coordinated with Joe Dobrota to this end.

I have begun updating the sponsor/exhibitor prospect data base. We will continue to work to expand the number of prospective sponsors and exhibitors especially those who work with higher education institutions that are not in the education lending business. We must diversify our sponsor base.

An RFP for drayage services at Annual Conference will be sent to prospective providers in September. I will be in communication with our event manager at Hyatt the in connection with this.

Karen Koonce has agreed to serve as a member of Sponsorship Committee for 2010-2011 and request approval thereof.

As a member of the Budget Recovery Task Force, I reviewed the current policies and pricing with respect to Sponsorship given the very different environment which we are now experiencing. Research was conducted so as to compare our policies and pricing with other regional associations. The Budget Recovery Task Force conducted a conference call on July 13, 2010, to discuss the issues surrounding

Sponsorship from both a policy perspective and pricing perspective. Based on the discussion, the following recommendations are submitted for Board action:

1. The requirement to be a member of SASFAA in order to exhibit at conferences and otherwise sponsor training activities should be ended.
2. Pricing should be more closely aligned with other regional FAAs. (see proposal for 2010-2011)
3. Consideration should be given to charging a higher conference registration fee to non-school, not-exhibiting attendees.

SASFAA Policies Related to Sponsorship

Section 4.4 Membership Pages 17-19

Section 6.16 Sponsorship Pages 38-45

Section 8.4 Advertising Pages 54-56

Section 11.1.2 Association Sponsors Page 71

Section 11.1.3 Coordination of Sponsored Activities and Schedules Pages 71-72

PROPOSED

SASFAA Exhibitor/ Sponsorship Options for 2010-11

SASFAA is pleased to offer you, our colleagues in the business sector, the opportunity to support our **training** efforts as financial aid professionals. While we will continue to offer individual training activities to sponsor, advertise and exhibit, we have also produced some discounted packages that will allow you take advantage of some very significant cost savings.

Our conference theme this year is *Waterways to the Future: Navigating a New Course for Student Success*. As you will see in the options available, we have extended this theme to our sponsorship packages.

Please review this list of various opportunities and determine those that you wish to support. Most items will afford you the opportunity to complete an on-line form and submit. We will follow up with an e-mail message confirming your choice and then arrange for an invoice to be issued. Some items may require additional information and discussion. Feel free to call or e-mail me with any questions you have.

R. Dewey Knight, Sponsorship Chair

rdknight@olemiss.edu

662-915-1166

FAX 662-915-1164

SASFAA Training Activities and Advertising Opportunities

Note: First-time exhibitors at the 2011 Conference shall receive a discount of 25% off the below Exhibitor Fees and Training Packages. Contact the Sponsorship chair for more information.

Training Packages

Commodore's Package	\$6000 (change from \$7500) 2 Conference Exhibit Booths Priority Booth Location (by date) On-line Conference Support Recognition Web Banner Ad for Fiscal Year 1/2 Page Ad in All Newsletters 1/2 Page Ad in NAO Workshop Program New Aid Officers Sponsorship Mid-Level Workshop Recognition
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By purchasing this package, you will save \$2400 on your total package versus sponsoring each item individually. All items listed in the package are training activities and/or advertising opportunities.

Admiral's Package

\$5000 (change from \$6000)
Conference Exhibit Booth
On-line Conference Support Recognition
Web Banner Ad for Fiscal Year
1/2 Ad in All Newsletters
1/2 Ad in NAO Workshop Program
Mid-Level Workshop Recognition

By purchasing this package, you will save \$1400 on your total package versus sponsoring each item individually. All items listed in the package are training activities and/or advertising opportunities.

Captain's Package

\$3500 (change from \$4250)
Conference Exhibit Booth
On-line Conference Support Recognition
Web Banner Ad for Fiscal Year
1/4 Ad in Two Newsletters

By purchasing this package, you will save \$600 on your total package versus sponsoring each item individually. All items listed in the package are training activities and/or advertising opportunities.

Conference Sponsorship Opportunities

Our annual training conference will be held February 13 – 16, 2011, at the Hyatt Regency Jacksonville Riverfront in Jacksonville, FL. Information regarding room reservations may be found at the conference section of our website (when available). Information about set-up times, shipping and drayage will be sent to the primary contact listed.

The annual training conference is open to all persons located within the SASFAA region or those doing business in the SASFAA region. The training conference is intended to provide topical discussions and training for financial aid professionals and those persons serving financial aid professionals.

Conference Exhibit Booth \$2000 (change from \$3000)

- Booth, location determined by vendor/sponsor chair, with notable exception outlined below in high visibility booth location policy.
- All exhibitors must register for and pay conference registration fees in order to exhibit and attend conference activities.
- Recognition of conference exhibitors will be listed in the conference program, alphabetical by company name and on the SASFAA website from the end of the conference to the end of the fiscal year. Exhibitors will be given the opportunity to opt out of this at their own discretion.

Priority Location \$500 (change from \$1000)

- Must be a conference exhibitor
- Entitles exhibitor to pre-select a booth location based on drayage company blue line layout
- High visibility booth locations will be honored by dollar amount contributed and then in order of date that web-based sponsor form is completed.

Extra Exhibit Booth \$500 (change from \$1000)

- Must be a conference exhibitor
- Entitles exhibitor to a second booth contiguous to original booth,
- Additional booths may be purchased at the same rate as the second booth

- Double booths may be limited due to space availability
- Double booths will be honored in order of date that web-based sponsor form is completed.

[] Non-Exhibit Conference Support \$1500 (change from \$2000)

- All conference supporters who wish to attend the conference must register for and pay conference registration fees in order to exhibit and attend conference activities.
 - Recognition of conference supporters will be listed in the conference program, alphabetical by company name and on the SASFAA website from the end of the conference to the end of the fiscal year. Supporters will be given the opportunity to opt out of this at their own discretion.

[] On-line Conference Support Recognition \$500.00

Listed alphabetically on conference on-line registration Web page with hyperlink to supporter's Web site. Must be an Exhibitor or Non-Exhibit Conference Supporter to qualify for this recognition.

NonConference Training Activities

[] New Aid Officers Workshop \$1000

Recognition of conference supporters will be listed in the training program, alphabetical by company name. Supporters will be given the opportunity to opt out of this at their own discretion.

[] Mid-Level Workshop \$1000

Recognition of conference supporters will be listed in the training program, alphabetical by company name. Supporters will be given the opportunity to opt out of this at their own discretion.

Advertising Opportunities

[] New Aid Officer Worskhop Ad \$500 Half Page

- Ads will be black and white and content is provided by advertiser
- Placement of ads will be at the discretion of the Vice President
- Ads may be limited due to space and will be honored in order of date web-based sponsor form is completed

News letter Ads

- Ads will be in color and content is provided by advertiser
- Placement of ads will be at the discretion of the Newsletter Editor
- Ads may be limited due to space and will be honored in order of date web-based sponsor form is completed
- Ad Copy should be sent to the Newsletter Editor by the 10th day of the month preceding the publication date.

[] Full Page Newsletter Ads \$500/ Issue

- [] Fall Issue
- [] Winter Issue
- [] Spring Issue
- [] Summer Issue

[] Half Page Newsletter Ads \$300/ Issue

- [] Fall Issue
- [] Winter Issue
- [] Spring Issue

[] Summer Issue

- [] Quarter Page Newsletter Ads \$200/ Issue
[] Fall Issue
[] Winter Issue
[] Spring Issue
[] Summer Issue

Newsletter Editor

Please send digital ad copy and web link to:

- [] Web Banner Ad \$1200 for Fiscal Year

- Ads will be in color and content is provided by advertiser

Placement of ads will be at the discretion of the Electronic Services Chair

[Virginia State Report](#)
[Heather Hollandsworth](#)

The VASFAA Transitional Board met June 22-23, 2010, at Wintergreen Resort to construct the foundation of the year's theme "The BIG Picture: Snapshots of the Past, Present, and Future." The prior board met for about a half day on June 22, and later, the new Executive Board discussed the President's Goals, Theme, Vision and Organizational Chart. We discussed of responsibilities of each position and maintaining communication with each other and the membership. One of the most important aspects of this year's board is to encourage and engage the membership for more involvement and to invite new leadership. That evening the committee chairs joined the board for a "family-style" evening of dinner and networking opportunities. On June 24th, the new Board and Committee Chairs met to plan the basis of the foundation for the upcoming year. A balanced budget was approved by the Board.

Executive Board:

- President: Heather Hollandsworth, Ferrum College
- Past-President: Sheila Nelson-Hensley, Bluefield College
- President- Elect: Melissa Barnes, Norfolk State University
- Treasurer: Margaret Murphy, Emory and Henry College
- Treasurer-Elect: John Brandt, Southern Virginia University
- Secretary: Kiesha Pope, J. Sargeant Reynolds Community College
- Representative at Large: Donna Taylor, Virginia Tech
- Representative at Large: Daniel Hewitt, Virginia College of Osteopathic Medicine
- Representative at Large: Vera Riddick, Old Dominion University
- Representative at Large: Stephanie Clements, Virginia Tech
- Special Appointee: Zita Barree, Hampden Sydney College
- Special Appointee: Lee Andes, State Council of Higher Education in Virginia

Committee Chairs:

- Archives: Holly Rison
- Awards and Nominations: Sheila Nelson Hensley
- Awareness: Shawn Thomas
- Budget and Finance: Bobby Clemmer
- By-laws: Sheila Nelson Hensley
- Conference: Kerrie Roth and Jeni Rone
- Development Partners: Michael Poma
- F.O.C.U.S.: Anita Aymer
- Electronic Services: Jane Moore
- Governmental Relations: Mike Hawkes
- Membership: Laurie Schiavone and Jeanne Holmes
- New Century Presidents' Council: Brenda Burke
- Newsletter: Eloise Turner
- Nominations and Elections: Sheila Nelson Hensley
- Non-Conference Training: Tamy Garofano and Charles Brantley

- Public Relations: Carly Kestner
- Secondary Schools: Julie Nix
- Sector Coordination: Melissa Barnes
- Site Selection: Melissa Barnes
- Strategic Planning: Tom Morehouse

The common goal for all is to increase training and leadership opportunities in an effort to increase volunteerism in VASFAA. The main committees that will be working on this initiative include Secondary School Relations, Public Relations, Conference, Non-Conference Training, Membership, and Awareness. In order to increase volunteerism, all Board Members and Committee Chairs will be asked to mentor certain new aid professionals throughout the year and hopefully beyond. We will be asking them to serve on committees in the hopes that they will eventually serve in higher leadership positions. All committees are already working on the goals that were set at the Transition Board meeting, including the Membership and Public Relations Committees which will be creating a list of “value-added” reasons to become a member of VASFAA, Conference Committee who is working on agenda for Annual conference that will be May 18-20, 2011 at the Westin in Richmond, Virginia and the Non-Conference Training Committee who will be working diligently on regional drive-in trainings and webinars over the course of the year.

I look forward to the upcoming year as we present many opportunities for involvement of the membership and constituent groups.

Tennessee State Report Sandra Rockett

TASFAA’s 2010-2011 Executive Board and its Committees have accomplished a great deal in a short period of time. Committee chairs are hard at work. The theme for the year is “Facing A New Day In Financial Aid”. There are many challenges facing financial aid professionals, but we are prepared to face those challenges with optimism.

The 2010-2011 Board met July 8 and 9 in Franklin, Tennessee, to plan for the year. Since there was no face-to-face transition meeting, the 2009-2010 Board was invited to promote a smoother transition. A demonstration of our new web site was presented by Rick Taphorn. Ron Gambill presented to the Board information on parliamentary procedures. The morning of the second day, the Board meeting was held.

The Board approved the lowest budget in well over a decade. Due to the diligence of prior presidents, we do not have outstanding conference contracts looming over us. Our budget was planned with the expectation of a reduction in income and not utilizing reserve funds. For that, we are very thankful. Our primary goals are directed to training for our membership. Plans are underway to have a fall training series in several regions in the state and a spring conference.

2010-2011 TASFAA Board

President--Sandra Rockett
 President-Elect/Sponsorship—Lester McKenzie
 Past President/Nominations/TASFAA Advisory to TSAC—Marian Huffman
 Treasurer—Ashley Bianchi
 Secretary—Amy Collins

Sector Representatives

Tennessee Technology Centers—Amanda Heath
 Four Year Private—John Brandt
 Two Year Public—Joy Goldberg
 Four Year Public—Donna Price
 Proprietary—Chris Farris
 At Large/Electronic Services—Rick Taphorn

Committee Chairs

Conference Chair—Jeff Gerkin
 Budget and Finance—Cara Suhr
 Association Governance—Clyde Walker
 Newsletter/Public Relations—Debby Nuchols
 Governmental Relations—Ron Gambill
 Historical—Jan Lassiter
 Membership—Leah Louallen
 Mentorship—Jeanne Stewart
 Awards/Financial Aid Awareness—Nancy Beverly

Long-Range Planning—Cruzie Lucero
Site Selection—Joanie Walker
State Programs—Tim Phelps
Training—Wanda Emfinger

TASFAA's Spring Conference will be held April 10-13, 2011 at the Cool Springs Marriott in Franklin, Tennessee.

South Carolina State Report
Jeff Holliday

Transitional Board Meeting

The 2009-2010 and 2010-2011 SCASFAA Boards met June 28-29 at the Ruby Hicks Administration Building on the campus of Tri-County Technical College. Goals were reviewed and discussed for the upcoming year for committee members.

SCASFAA's annual conference will be held from April 10-12 in Columbia, our state capitol. It has been 5 years since we have held our conference in Columbia and the first time in decades we have held our only conference meeting in the capitol city. Aria Simmons and her committee have expressed some great ideas and will put together a fabulous program in the months to come.

The Consumer Relations Committee will be chaired again by Violette Hunter. Violette has done an outstanding job with College Goal Sunday and has expanded the number of sites each year under her direction. Violette plans on expanding College Goal Sunday even more this year by adding additional sites and marketing the event even more than before. As President, I am urging all members of SCASFAA to volunteer for the College Goal Sunday event.

The Budget Committee, chaired by Nikisha Dawkins, met on July 26th. One of the lowest budgets in recent memory was approved. SCASFAA has experienced a downturn in membership and has created the need to be more conservative with our budget. We are very appreciative of the previous years of sound, fiscal leadership and continue to stay the course for our association. Another focus of our budget committee along with our President-Elect is to explore investment opportunities for our state that may provide greater return on investment.

Ellen Green is chairing an Advisory Committee to CHE (state agency that oversees State Scholarship Programs). The purpose is to ensure constant communication between CHE and the financial aid offices and develop a clear understanding of regulatory ramifications for all involved. We believe this to be a critical committee this year due to impending state budget cuts.

The full committee of the 2010-2011 SCASFAA Board can be found at www.scasfaa.org.

North Carolina State Report
Paul Coscia – not submitted

Mississippi State Report
Donna O'Quinn

The sun beamed glimmering strands of gold down on Mississippi's financial aid administrators as they entered the Hollywood Casino in Bay St. Louis, Mississippi, for the 43rd Annual MASFAA Conference. As MASFAA met Hollywood, with our theme of "Stars in Student Success", our goal was to celebrate the camaraderie between ourselves as financial aid professionals as well as the successes of our students, for the success of our students is truly what makes Mississippi shine.

128 MASFAA members attended the 2010 MASFAA Conference, which was actually an increase over the 119 who attended the 2009 conference. It was a delightful surprise for Seph Anderson, Conference Chair, and the members of the Conference Committee. Since 1967 MASFAA has served the students and families of the State of Mississippi by offering training events for financial aid professionals across the state, by providing networking opportunities for financial aid professionals and their peers, and by promoting higher education events for students and their families across the state. These services must be continued for future generations of Mississippi's students' and their families as well, but we are faced with economic constraints that will impact us significantly. That is why our state our organizations are so very important and why we must continue to support them.

With the changes in the student loan program that have occurred as a result of the Health Care and Education Reconciliation Act of 2010, MASFAA is looking at losing as much as one half of its membership and we will lose most of our revenue with regard to our budget. This comes from our dependence for years upon significant vendor support from Lender/Service funding that is longer available to us as an organization.

Our tasks for the upcoming year will be to seek alternative methods for securing revenue for the organization, since our ability to provide services for our members is driven to a large extent by our revenue; to seek more effective, more cost efficient methods for providing

training opportunities to MASFAA members and our associates; and to seek possible methods for increasing membership numbers in the MASFAA organization among higher educational institutions in the State of Mississippi.

There is no doubt that the upcoming year will bring difficult choices for MASFAA as an organization. This will not be the first time financial aid administrators have faced such challenges thrown to us by the U.S. Department of Education, will it? Is it good that those of us who have been around for a while are so adaptable to change, or at least that we can put on a good show of it, anyway!

Election Results

President-Elect: Seph Anderson, The University of Mississippi
Vice-President: Leslie Smith, Copiah-Lincoln Community College
Director: Robert Walker, Itawamba Community College

Transitional Board Meeting

The MASFAA Transitional Board Meeting has been postponed due to the emergency surgery and recovery of two committee chairs during July from current Board, the prolonged illness of the Treasurer from the current Executive Board during July, the resignation and exit from the field of the newly elected Treasurer from the newly elected Executive Board, and the resignation of two newly appointed Committee Chairs from the new Board.

Kentucky State Report Dave Cecil

It is exciting to see many KASFAA committees hard at work already in 2010-2011. Specifically, President Dave Cecil has worked closely with the Program, College Goal Sunday, and Budget committees over the past few weeks making immediate plans for the year. All committees are busy setting goals and finalizing committee members.

KASFAA Transition Meeting

The KASFAA transition meeting was held in Frankfort, KY at the KHEAA building on June 8. The meeting consisted of goal setting for 2010-11 as well as time for the outgoing board to meet with the incoming board.

2010-2011 KASFAA Executive Board

President

Dave Cecil, Transylvania University

Vice President for Training

Laura Keown, Centre College

President-Elect

Aaron Gabehart, Campbellsville University

Secretary

Rhonda Bryant, University of Kentucky

Treasurer

Chris Tolson, Campbellsville University

Past President

Chester Priest, KHEAA/ The Student Loan People

Board of Directors

Four-Year Public School Representative

Shelley Park, Eastern Kentucky University

Private School Representative

Gina Kuzuoka, Spalding University

Two-Year Public School Representative

Chuck Anderson, Hazard Community College

Proprietary School Representative

Charlene Geiser, Sullivan University

Agency Representative

Jennifer Eastman, KHEAA

Lender Representative

Vacant

Committee Chairs

Archivist/Historian

Chester Priest, KHEAA/ The Student Loan People

Articles and Bylaws

Rhonda Bryant, University of Kentucky

Awards

Charles Vinson, Hopkinsville Community College

Budget & Finance

Derek Ball, Bluegrass Community College

College Goal Sunday

Shawn Anderson, Somerset Community College

Angela Black, University of Louisville

Diversity Concerns

Jennifer Anderson, Spalding University

High School Counseling Training

Rhyan Conyers, Georgetown College

Kate Ware, Midway College

Legislative Issues

Shelley Park, Eastern Kentucky University

Long Range Planning

Nancy Melton, Berea College

Membership

Robin Buchholz, KHEAA/The Student Loan People

Newsletter

April Kendrick Tretter, ATA College

Nominations

Chester Priest, KHEAA/The Student Loan People

Program (Fall)

Jennifer Priest, Transylvania University

Aaron Gabehart, Campbellsville University

Program (Spring)

Jennifer Priest, Transylvania University

Laura Smith, Midway College

Public Relations/FA Awareness

Michael Morgan, KCTCS

Training, NASFAA

Chuck Anderson, Hazard Community College

Training, Support Staff

Sabrina Holder, Gateway Community College

Vendor/Sponsor

Katie Conrad, Midway College

Website/Technology

Jason Tretter, KHEAA/The Student Loan People

Meetings

KASF AA's Program committee met on July 26 to plan for the fall 2010 Conference to be held at the Holiday Inn Hurstbourne in Louisville. The dates of the conference are October 13-15, 2010. The conference theme is "KASF AA – Blazing New Trails." We look forward to a great conference with a \$84/night room rate and an \$85 conference registration fee.

The KASF AA Executive Board met on July 27 at KHEAA's offices in Frankfort. The Board approved a tentative budget for 2010-11 and the Program committee's tentative agenda for the fall conference. The Board approved January 30, 2011 as the date for College Goal Sunday. The Board was pleased to hear that NASFAA has decided to offer Fall Training in a decentralized format again.

The spring KASF AA conference will be held April 6-8, 2011 at the Crowne Plaza (Campbell House) in Lexington.

Georgia State Report
Doug Tanner

Our Transition Meeting was conducted June 28-29 at the Atlanta Gwinnett Place Marriot.

The following 2010-2011 Officers assumed their duties:

Nancy Ferguson – President-Elect from University of Georgia
Cathy Crawley – Vice President for Professional Development from Georgia College & State University
Caylee French – Vice President for Programs from Georgia Student Finance Commission
Amy Moser – Treasurer from SunTrust Education Loans
Sarah Twiggs – Secretary from Northwestern Technical College

The following Committee Chairs also assumed their responsibilities for the upcoming year:

Phillip Hawkins – Members
Sandra Griffin – Diversity
Cassandra Burney – Community Action
Deborah Clark – Newsletter
Leann Kirkland – Legislative Affairs
Justin Mitchell – Electronic Services

During the Transition Meeting the decision was made to host a Fall one day meeting and to try to conduct this meeting in conjunction with training provided by the Georgia Student Finance Commission related to state financial aid programs. A tentative time frame in late October or early November is planned. This meeting will include a federal update other training to be determined later.

The Membership Committee has undertaken an investigation of offering institutional memberships. They will determine the cost associated with this change and benefits to GASFAA and the membership. We hope to have a proposal for our winter board meeting for possible announcement at the Spring Conference and implementation in 2011-2012.

The board has decided to begin searching for a site for a Fall 2011 Conference. The board is very interested in getting back to two conferences each year. We are investigating the use of smaller hotels in conjunction with local conference facilities to minimize the cost of a second conference.

A budget was developed which reduced income and spending by \$25,650 (more than a 20% reduction). Hopefully, this reduction will prevent us from having to use reserve funds.

Our next board meeting will be conducted in conjunction with the one day meeting.

Our Spring Conference is scheduled for May 18-20, 2011.

Florida State Report
Nathan Basford

It is a pleasure to serve again on the SASFAA executive board. I look forward to an exciting year.

The current economic times are having an impact that is being felt by all state associations, their members and their schools. FASFAA members are also experiencing these challenging economic times. Because of this, we must begin:

"Rethinking our Ideas and our Strategies in order to have a Successful Future"

Thus Our theme for the year!

Goals:

- New Training opportunities throughout the year.
- Evaluating our website
- New Partnerships
- Updating our Policy & Procedure Manual
- Five year plan

Mark your calendars:

- August 12: Transition Board Meeting / Naples, FL
- August 13: Executive Board Meeting// Naples, FL
- Nov. 30 –Dec 3: Federal Student Aid Conference/Orlando, FL
- May 31-June 3, 2011: FASFAA Annual Conference/Naples, FL

Future Events: (Dates & Locations will be discussed @ transition meeting)

- Regional Workshops:
- Clock Hour Workshop:
- Possible High School Counselors Workshops:
- Financial Aid Directors Roundtable Session:

Alabama State Report
Amanda Sharp

AASFAA held its Transition Meeting June 14, 2010 on the campus of Huntingdon College in Montgomery, Alabama. The 2010-2011 AASFAA Officers are: Amanda Sharp, President; Past President, Andy Weaver; Vickie Adams, President-Elect; Sharon Williams, Vice President; Kevin Ammons, Treasurer; Belinda Duett, Treasurer-Elect; Betty Edwards, Secretary.

My goals for 2010-2011 are as follows:

1. Continue to provide cost-effective, quality training opportunities of AASFAA members.
2. Increase efforts to involve more new AASFAA members in committee activities thereby helping cultivate future leaders in the association.
3. Continue to hold only one state conference per year. The state conference costs should be completely offset by registration fees and exhibitor fees.

I attended the annual NASFAA Conference in Denver, Colorado, July 18-21, 2010.

Bill Spiers
Legislative Relations – no report submitted

Joe Dobrota
Electronic Services Chair

Summary of Activities

GAP35: Continue to review emerging technologies and incorporate those which could provide significant benefits to SASFAA members and result in cost-savings to the Association.

Activity 1: Began compiling a list of required items SASFAA currently utilizes electronically. List will be basis from which we determine solutions should we switch from ATAC. Received assistance from TASFAA Electronic Services chair in compiling the list.

Activity 2: Began discussions and setup of the Job Board posting. Contacted several electronic services chairs from other regions already using the module. All reported ease of use and cost benefits. The module is now setup in a testing instance

GAP24: 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.

Activity: Submitted request to ATAC to change/activate membership form for the 2010-2011 year. Tested submission. Notified membership chair that form is ready for use. Updated credit card payment page to allow payment of 2010-2011 membership dues.

PP 6.52 Encourage development and utilization of cost-efficient, timely means of communication, including the web, list serves and e-mail by the Board, committees and the membership.

Activity 1: Solicited changes to state pages from State presidents. Made annual Board transition changes to executive board/committee chair sections of the website. Submitted request to ATAC to post the annual President's update (completed).

Activity 2: Per request of President Elect, developed online Committee Member Form using SASFAA's Form Site account. The form collects important data on potential committee members. Committee chairs can use the data to ensure a diverse representation on their committee. As of August 3rd, 51 potential committee members had completed the form.

PP 6.51: Disseminate quality information to enhance communications among members in a timely and cost-efficient manner.

Activity: Performed annual board transition updates. Updated website with new forms inclusive of new Treasurer mailing information.

Newsletter Editor Report Ben Baker

Summary of Activities

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

LRP 4.1: Appoint committee members, to the extent possible, to reflect a practice of inclusiveness.

LRP 4.4: Ensure that the committee chair, with the approval of the Board of Directors, makes every effort to identify an appropriate mix of returning and new members to assure the continuity of committee business and development of future leadership

Activity: An email was sent to each state's president asking them to nominate a representative to serve on the 2010-2011 SASFAA Newsletter Committee. If approved, each state submitting the name of a person will have representation on the newsletter committee as shown below:

Alabama	Anthony Richey	Returning
Georgia		
Florida		
Kentucky	April Tretter	Returning
Mississippi		
North Carolina	Jennifer Rone	New
South Carolina	Jennifer Williams	
Tennessee	Debby Nuchols	Returning
Virginia		
Chair	Ben J. Baker	New

PP6.0: Prepare and submit reports to the secretary and make reports and submit action items at Board meetings.

Activity: The Newsletter Committee chairperson submitted a board report for August to the Secretary.

PP6.0: Develop goals and objectives in keeping with committee/liason charges, the bylaws, the mission statement and long-range plan and in consideration of the recommendations of the governance and planning committee.

Activity: The Newsletter Committee established goals and objectives to meet the bylaws, mission statement, long range plans, and GAP recommendations for 2010 – 2011.

Discussion

The newsletter schedule for 2010 - 2011 has been established (October, December, April and June). Articles and ads must be submitted to the Newsletter Editor no later than the 10th of the month preceding publication. You may view previous newsletters as a guide. An email reminder will be sent approximately 30 days before the newsletter articles are due. If you are not submitting an article, please submit an email indicating – "no article for this edition."

Newsletter Contents

The newsletter shall include news of interest to student aid administrators including professional development information and events pertaining to aid administrators in the SASFAA region. The newsletter shall contain the following items:

- Message from the President
- Board meeting highlights
- Treasurer's Report
- Committee Reports
- State Reports
- Calendar of training and development activities in the region

Newsletter Deadline

The fall edition of the newsletter is due in October. The deadline for articles is **September 10, 2010**. All submissions (articles, ads) should be submitted to the Newsletter Editor, Ben J. Baker, at bjbaker@una.edu. Materials should be sent as a word attachment, times new roman font, 10 pitch, and third person.

Subsequent editions and deadline dates are as follows:

Fall edition	October	September 10, 2010
Winter edition	December	November 10, 2010
Spring edition	April	March 10, 2011
Summer edition	June	May 10, 2011

2020 Committee Report Runan Pendergrast

Summary of Activities

LRP3.2/PP6.0: The advice and assistance provided to the Board of Directors by committee chairs are such that the goals of the Association are readily accomplished, future leadership is developed, and board activities remain fiscally responsible.

Activity: The 2020 Committee's goals and objectives for 2010-2011 will be submitted to the SASFAA President for approval.

LRP4.1/LRP4.3/LRP4.4: 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: A suggested 2010-2011 2020 Committee was selected and sent to the SASFAA President. Final approval will be made by the Executive Board at the August board meeting.

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

Activity: The 2020 Committee Chair has reviewed the policies and procedures for the committee and found them to be accurate and complete.

PP6.0: Disseminate quality information to enhance communications 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 meetings.

Activity: The 2020 Committee Chair submitted a copy of 2020 Committee Board Report to the SASFAA Secretary on July 27, 2010.

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

Activity: The 2020 Committee will provide a list of expected activities the SASFAA President.

Discussion

The 2010 Committee Chair has tentatively scheduled a conference call for committee members on September 17 to begin planning diversity activities for the year. The committee will work with the Conference Committee to develop sessions on various diverse topics to be presented at the annual conference. The committee is open to all ideas and suggestions, these ideas and suggestions will be referenced in a future report.

Recommendations: The 2020 Committee Chair recommends Board approval of the following committee members:

Debra Talley, University of Alabama, AL
Mike O'Grady, Overture Technologies, VA
Vernestine Bannerman, NC Central University, NC
Dameion Lovett, University of South Florida, FL
Michael Barlow, Elizabethtown Community & Technical College, KY

Agency Report/Lender Liaison Report
Agency Report
Janet Nowicki

Florida Update

Highlights of OSFA's Outreach Team:

Overview

The Florida Department of Education (FDOE), Office of Student Financial Assistance (OSFA) Outreach Team assists assigned postsecondary educational institutions (and other program participants), located within a defined geographical area of Florida, with communications and operations related to student financial aid. The Outreach Team represents the Federal Family Education Loan Program and Florida state scholarship and grant programs.

Statistics

During the 2009-10 fiscal year, the Outreach Team made nearly 80,000 contacts to assigned Florida postsecondary educational institutions. Additionally, the Outreach Team conducted 294 financial literacy workshops at 492 institutions reaching a total of 12,747 students. Each of the eight Outreach Representatives serves as a point of contact among individual institutions (and other program participants) in their area. The Outreach Team is responsible for:

- Conducting on-site visits and evaluations of postsecondary institution's financial aid programs.
- Providing technical assistance and services to support financial aid volume.
- Providing training and educational assistance regarding:
 - Florida's scholarship and grant programs.
 - National Training for Counselors and Mentors (NT4CM) program.
 - Default prevention and default aversion.
 - Financial literacy.

Resources

The OSFA Outreach Team features "**Navigating Your Financial Future**" (NyFF), a comprehensive default prevention program. Utilized as an educational tool, NyFF offers comprehensive services and educational resources for students so they can learn to manage student loan debt successfully. View NyFF online at www.navigatingyourfinancialfuture.org/.

Georgia Report

Georgia Student Finance Commission designated Guarantor (GHEAC) for Georgia.

State Legislative Summary

The 2010 session of the Georgia General Assembly was active and long. The general assembly created a new lottery funded need based aid program targeted at the neediest of students. Other legislative budget action ended most service cancelable loan programs in Georgia. Georgia, like many other SASFAA states continues to experience ongoing budget challenges.

FFEL Wind Down

GHEAC continues to work with borrower, school and lender customers to effectively and efficiently wind down FFEL origination activity. GHEAC guaranteed its last loan on June 25, 2010 which marks the end of 44 years of guaranty activity. Since 1966, GHEAC guaranteed more than 1.9 million loans to 650 thousand borrowers for a total of \$5.8 billion. GHEAC continues to offer default prevention and a host of other services to Georgia students and schools.

Transcript Exchange

Previously we reported that we launched a new service that benefits all high school students in monitoring and determining their eligibility for the HOPE Scholarship Program. The "HOPE Progress Report" is a free service designed to capture 9th-11th grade transcript information and calculate interim HOPE GPAs. With this new feature, students can check on their progress towards HOPE eligibility as early as the 9th grade.

The purpose of this service is to give students, parents, and counselors an additional tool to view and monitor a student's progress toward HOPE eligibility – eliminating the "HOPE surprise" in their senior year. Students and parents have secure electronic access to the HOPE Progress Report through their My411 account on GAcollge411.org.

During the 2010 legislative session of the General Assembly, new law was enacted that makes the HOPE Progress Reports mandatory.

GAcollge411

GSFC continues to enhance the GAcollge411.org website and usage continues to grow.

Submitted by: Tracy Ireland on behalf of Tim Connell, President Georgia Student Finance Commission.

Mississippi Report

The Mississippi Office of Student Financial Aid is happy to be knee-deep in the annual award process for the 2010-11 aid year. Barring unforeseen cuts, the state expects to have adequate funding for FY 2011 to award all eligible applicants. This should be excellent news to

Mississippi students after the state experienced a bleak 2009-10 aid year. The state of Mississippi experienced five mid-year budget reductions in FY 2010. Three of these cuts affected the Office of Student Financial Aid. The net result was a decrease of 9.05% in state funds for financial aid. The state awarded nearly \$14 million to students through the state's primary grant program, Mississippi Resident Tuition Assistance Grant (MTAG), which is about \$1.6 million less than the previous year. The state awarded approximately \$27.3 million total to students through the various grant and loan/scholarship programs, about \$1.3 million less than the previous year.

Jennifer Rogers Director of Student Financial Aid Mississippi Institutions of Higher Learning

North Carolina State Agency Report

August 5, 2010

The North Carolina General Assembly appointed a Select Committee to study financial aid in the state and the Select Committee made recommendations for further study into consolidating some of the state's grant programs into one program. A report outlining options for consolidation will be submitted to the General Assembly on October 1, 2010. Changes to the grant programs could be enacted as early as July 1, 2011.

The North Carolina General Assembly continues to support the state's needy students during these challenging economic times. Funding for need-based grant programs increased in many programs to extend funding to more students for the 2010-11 year.

The State Education Assistance Authority continues to offer training for the state's financial aid administrators and has just completed a series of regional workshops around the state to update FAAs on the state's programs. In addition, workshops for school counselors are scheduled for six locations in October to provide updated information on financial aid programs.

Submitted by Elizabeth McDuffie

SOUTH CAROLINA TUITION GRANTS COMMISSION REPORT

In 2010, the South Carolina Tuition Grants Program celebrates 40 years of serving South Carolina students. Since its start, over 350,000 grants have been made worth over \$700 million. As the 2009-2010 award year draws to a close the South Carolina Tuition Grants Commission is paying out the final student grants for the Spring Semester. As previously reported, the Tuition Grants Program experienced an unprecedented and historic increase in eligible students for the 2009-2010 award year with over 14,200 students receiving grants.

The significant increase in recipients being awarded from a finite pool of funds required the Commission to reduce Spring Semester grants for all students by 22.2% of the Spring-only portion of their grants. The reduction effectively reduced the Maximum Grant for the year from the initially approved tentative grant of \$3,150 to \$2,800. In February, the Tuition Grants Commission met to decide on the amount of Maximum Grants for the 2010-2011 award year. By that point in time the State Budget was being considered by the South Carolina House of Representatives' Ways and Means Committee. Initial reports were that all state financial aid programs would be level-funded despite additional significant reductions in State revenues. Based on that information, the Commission set the 2010-2011 Maximum Grant at \$2,600. This represents an additional \$200 drop in the annual value of the grant, but is necessitated by the forecast of additional increases of 5-7% in enrollments and eligible students at South Carolina's independent colleges. Award letters began going out to students during the first week of March. Tentative awards will continue to be made throughout the summer to all students who apply via the FAFSA by the June 30 deadline. As of today, the State Budget has been passed by both the House and the Senate with differences remaining to be resolved via conference committee. Fortunately, state financial aid programs, including the South Carolina Tuition Grants Program, have been level-funded by both the House and the Senate. However, level-funding of the state financial aid programs was not passed without several attempts to make reductions. With the continued volatile state of the South Carolina State Budget, including projections of even greater reductions in revenues for next year, no doubt all state financial aid programs including grants and scholarships will be fair game for funding reductions in 2011-2012.

Earl Mayo, Director

TENNESSEE STUDENT ASSISTANCE CORP (TSAC) UPDATE TO SASFAA

Jane Pennington August 2010

Grant and Scholarship Programs Update

For the 2009-10 academic year, state and lottery funded programs disbursed approximately \$340 million in aid. This represents a 7% increase from the 2008-09 academic year.

The Tennessee Education Lottery Scholarship (TELS) programs disbursed almost \$291 million in aid which included \$6.8M to the state's need-based grant, the Tennessee Student Assistance Award (TSAA). TELS expenditures outpaced revenues for a second straight year by approximately \$6 million which was lower than projected.

A lottery study committee is scheduled to meet on August 16th to discuss the continued viability of the TELS programs. The committee will consist of members from the Senate and House, constitutional officers and representatives from the state's other higher education entities.

Loan Division Update

The Loan Staff was talking recently about the fact that we've operated an entire month in the new world of loans. The staff is making plans as we redefine ourselves and move forward into the future. We are working closely with the schools in Tennessee, our servicer and

other partners as we plan out this move. We look forward to continuing to serve Tennessee students and the Tennessee schools. Much of our focus will be on Default Management.

We are also very proud of the fact that one of our own, Stephanie Aylor, was recently named *Common Manual Policy Committee Chair*. Stephanie has been an active member of the Committee for 6 years, and has been with the TSAC Loan Division for almost 18 years.

Long Range Planning Report Ron Day

The planning phase of the LRP for 2011-2016 is continuing. Following the “Listening Sessions” held at the annual conference, the LRP constructed a membership survey. Attached to this report are the results gathered.

The LRP Committee met at the NASFAA Conference in Denver. The meeting included a discussion of the results of the recent survey. It also included the following agenda:

1. Review of the Survey Results
2. Review of the LRP and divisions:
 - a. Organizational Structure
 - i. Board
 - ii. Committees
 - b. Leadership
 - i. Development
 - ii. Opportunities
 - iii. Inter-regional visitors
 - c. Membership
 - i. Value of ...
 - ii. Increase
 - iii. Institutional
 - iv. Increase Dues
 - d. P & P
 - e. Communication
 - i. Sectors – see value
 - ii. Link between NASFAA – SASFAA – States
 - iii. Dissemination of Info
 - f. Leg. Relations
 - g. Prof. Dev.
 - i. What events to continue – and what to discontinue
 - ii. Why – what is the outcome
 - h. Finances
 - i. Limit – Review – Revamp
 - ii. Creative Approach
3. Next Approach
4. Set date for face-to-face meeting

Below is the plan for future activities:

1. Send out a “Doodle” to members of the committee for a teleconference – most likely mid September
2. After the teleconference –
 - a. Begin the re-construction of the LRP – based on reflections and suggestions
3. Do another “markup” of the 06/11 LRP – late Sept
4. Send it to the committee members
5. Schedule a face-to-face meeting in October –
 - a. Finalize suggestions/reflections – on 11/16 LRP
6. Do another markup – send it to committee members – later part of October
7. Have the document ready for the Nov Board mtg. – for their review
8. After suggestions from the Board – revise as appropriate
9. Have it re-marked – presented once more to the committee
10. Present the final document to the Board in February for a vote

Respectfully submitted.

Ron Day, Chair
David Cecil

Laura Diven-Brown
 David Gelinas
 Karen Koonce
 Carol Mowbray
 Janet Sain
 Dee Talley

SASFAA Planning Survey 2009-2010 (revised June 30, 2010)

As economic and legislative changes affect the financial aid profession, we are challenged to adapt to a "New Normal". Similarly, SASFAA is evolving to meet the needs of its membership.

At the Annual Conference last February, several "Listening Sessions" were held to gather ideas, concerns, and suggestions for the development of the SASFAA 2011-2016 Long-Range Plan. The Board, Past Presidents, and the general membership were all invited to participate. A lot of valuable input was provided as a result.

This survey is a follow-up to these activities. We know that things cannot remain the same, so it's time to decide what changes to make to ensure that our association provides value-added services and remains financially sound. We need your insights and perspectives to help us chart a new direction.

ABOUT YOU

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

67	Public 2-Year College	70	Public 4-Year College
3	Private 2-Year College	86	Private 4-Year College
6	Graduate or Professional School	13	Career School
15	Student Loan Lender	4	Student Loan Servicer
10	Guarantor	12	Consulting Group
8	Government Agency	0	Financial Aid Software Company
8	Other (non-profits, foundations, etc.)		

How many years have you been in financial aid? *

8	0 - 1 year	50	2 - 5 years	56	6 - 10 years
39	11 -15 years	42	16 - 20 years	107	21+ years

How many years have you been in SASFAA? *

47	0 - 1 year	74	2 - 5 years	67	6 - 10 years
35	11 -15 years	25	16 - 20 years	54	21+ years

Are you serving (or have you served) SASFAA in any of the following capacities? Please check all that apply. *

94	Session moderator	67	Session presenter
29	Event sponsor	94	Committee member
45	Committee chair	53	State Association President on the SASFAA Board
27	Elected SASFAA Officer	168	Not Applicable

Which of the following SASFAA programs have you attended previously? *

54	SASFAA Leadership Symposium	78	SASFAA New Aid Officers Workshop at the conference
233	SASFAA Annual Conference	116	SASFAA New Aid Officers Workshop in the summer
48	SASFAA Management Institute	32	SASFAA Mid-Level Managers Workshop

EVENTS - Professional Development

ANNUAL CONFERENCE

For all members, held every February from Sun-Wed. Fee was \$250/ person. This year's attendance was approximately 350. Without a significant change in income, SASFAA will no longer be able to provide the conference in its present form.

	Please rank your opinion on a scale of 1-5. 1=Highly Agree, 2=Agree, 3= Don't Know/No Opinion, 4=Disagree, 5=Highly Disagree	1 Highly Agree	2	3	4	5 Highly Disagree
1	The conference should be self-supporting (by cutting costs and/or increasing revenue.)	91	90	42	9	1
2	It should be shortened by one day.	37	61	73	32	29
3	It should be held on a Tues-Fri cycle instead of Sun-Wed.	63	40	70	27	32
4	Food and structured meal events should be eliminated to reduce registration costs (similar to the FSA Conference).	59	81	42	37	15
5	The host state should waive their conference that year and encourage their state members to attend SASFAA instead.	37	52	49	52	44

6	Conference location should be centralized within the region or chosen because of its convenience for traveling (such as Nashville, Atlanta, Charlotte, Birmingham, Orlando), without state rotation for the foreseeable future, to contain costs.	86	77	35	22	11
7	It should be held at the same location for several years to contain costs through a multi-year contract.	40	68	71	35	18
8	Offering this event to the membership should be a SASFAA priority.	98	85	36	7	3

If the Annual Conference registration fee is raised from \$250, what would be the maximum amount you would recommend?	
<input checked="" type="checkbox"/> \$300 (113)	<input type="checkbox"/> \$350 (78) <input type="checkbox"/> \$400 (20)

Are you (or someone in your office) likely to attend in 2010-11?	
<input checked="" type="checkbox"/> Yes (188)	<input type="checkbox"/> No (45)

NEW AID OFFICERS WORKSHOP

For FA professionals with 3 years or less experience, held each year for one week in June on a college campus. Fee last year was \$685, which included everything (room, board, meals, activities, and materials) except transportation. Attendance was 71.

Please rank your opinion on a scale of 1-5. 1=Highly Agree, 2=Agree, 3= Don't Know/No Opinion, 4=Disagree, 5=Highly Disagree		1 Highly Agree	2	3	4	5 Highly Disagree
1	It should be self-supporting (by cutting costs and/or increasing revenue.)	103	60	45	12	4
2	It should be held every 2 years, not annually.	41	58	38	47	40
3	It should continue to be held on a college campus.	86	56	50	18	13
4	It should be held at a hotel (for reasons such as convenient traveling OR because people don't want to stay in a residence hall.)	29	31	68	56	39
5	Offering this event to the membership should be a SASFAA priority.	108	67	40	6	1

If the workshop fee is raised from \$685, what would be the maximum amount you would recommend?	
<input checked="" type="checkbox"/> \$750 (157)	<input type="checkbox"/> \$800 (43) <input type="checkbox"/> \$850 (13)

Are you (or someone in your office) likely to attend in Summer 2010 or Summer 2011?	
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Yes (35) No (122) Don't Know (65)

NEW AID OFFICERS PRE-CONFERENCE TRAINING

For FA professionals with 3 years or less experience, held each year as a 2-day pre-conference event. Fee was \$100/person (or \$75 for conference attendees). Attendance was 26.

Please rank your opinion on a scale of 1-5. 1=Highly Agree, 2=Agree, 3= Don't Know/No Opinion, 4=Disagree, 5=Highly Disagree		<u>1</u> Highly Agree	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u> Highly Disagree
1	The fee should be raised to help pay for costs.	58	61	59	22	15
2	It should be held every 2 years, not annually.	34	39	51	49	41
3	It should be held as a track at the conference and not a stand-alone event.	67	65	51	24	10
4	Offering this event to the membership should be a SASFAA priority.	78	76	44	11	7

If the pre-conference training fee is raised from \$75 (for conference attendees) and \$100 (for non-attendees), what would be the maximum amounts you would recommend?

\$100/\$125 (136) \$125/\$150 (50) \$150/\$175 (18)

Are you (or someone in your office) likely to attend in 2010-11?

Yes (20) No (120) Don't Know (70)

MID-LEVEL WORKSHOP

For middle-level managers, typically held every 1-2 years as a stand-alone event but became a one-day pre-conference activity in 2010. Fee was \$75/person (or \$50 for conference attendees). Attendance was 18.

Please rank your opinion on a scale of 1-5. 1=Highly Agree, 2=Agree, 3= Don't Know/No Opinion, 4=Disagree, 5=Highly Disagree		<u>1</u> Highly Agree	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u> Highly Disagree
1	It should be held every 2 years, not annually.	83	63	35	16	10
2	It should be a stand-alone activity again (not a pre-conference event).	39	44	54	43	27

3	Offering this event to the membership should be a SASFAA priority.	55	57	69	15	10
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If the workshop remains a pre-conference activity and the fee is raised from \$50 (for conference attendees) and \$75 (for non-attendees), what would be the maximum amount you would recommend?								
<input type="checkbox"/>	\$75/\$100	(116)	<input type="checkbox"/>	\$100/\$125	(50)	<input type="checkbox"/>	\$125/\$150	(32)

Are you (or someone in your office) likely to attend in 2010-11?								
<input type="checkbox"/>	Yes	(25)	<input type="checkbox"/>	No	(95)	<input type="checkbox"/>	Don't Know	(82)

MANAGEMENT INSTITUTE

For senior-level FA professionals, a 3-day program typically held every 3-5 years at the Grove Park Inn in Asheville, NC. >Fee was \$250 in 2008. Attendance was 49.

Please rank your opinion on a scale of 1-5. 1=Highly Agree, 2=Agree, 3= Don't Know/No Opinion, 4=Disagree, 5=Highly Disagree		1 Highly Agree	2	3	4	5 Highly Disagree
1	It should be self-supporting (by cutting costs and/or increasing revenue.)	108	51	41	5	2
2	It should be established as a pre-conference activity instead.	39	60	63	20	24
3	Offering this event to the membership should be a SASFAA priority.	57	55	64	20	8

If the Management Institute registration fee is raised from \$250, what would be the maximum amount you would recommend?								
<input type="checkbox"/>	\$300	(118)	<input type="checkbox"/>	\$350	(51)	<input type="checkbox"/>	\$400	(25)

Are you (or someone in your office) likely to attend in 2010-11?								
<input type="checkbox"/>	Yes	(33)	<input type="checkbox"/>	No	(83)	<input type="checkbox"/>	Don't Know	(88)

LEADERSHIP SYMPOSIUM

For emerging state leaders, 3 selected from each state to attend with all expenses paid. This 2-day event was held in 2007 and 2008 (the venue was the Grove Park Inn in Asheville, NC) but not in 2009.

	Please rank your opinion on a scale of 1-5. 1=Highly Agree, 2=Agree, 3= Don't Know/No Opinion, 4=Disagree, 5=Highly Disagree	<u>1</u> Highly Agree	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u> Highly Disagree
1	The state associations should help to pay the expenses of the participants.	54	51	52	21	31
2	It should be held every 2 years, not annually.	74	63	49	10	12
3	Offering this event to the membership should be a SASFAA priority.	51	43	83	22	10

FINAL TOPICS

Our dues for 2009-10 had been \$25 for an individual. As approved by the membership at the February conference, dues were increased for 2010-11 to \$35.

	Please rank your opinion on a scale of 1-5. 1=Highly Agree, 2=Agree, 3= Don't Know/No Opinion, 4=Disagree, 5=Highly Disagree	<u>1</u> Highly Agree	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u> Highly Disagree
1	SASFAA should allow an option for institutional membership (where the institution can pay a fee and be able to register multiple staff members at a discount) in addition to individual membership.	82	64	29	17	26
2	If an institutional membership option is created, it should be similar to how NASFAA does it - available to schools only and based on size (student population).	53	54	44	29	37
3	If an institutional membership option is created, the fee should just be based on a bulk discount (e.g. instead of 5 individual memberships for \$35 x 5 = \$175, the institutional membership should allow for 5 members for \$140, etc.)	60	80	46	15	13
4	SASFAA should explore combining and discounting membership for state/regional/national all in one solicitation.	47	60	62	25	20

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, "10" is of least importance to you.)

<u>Average Score of Those of Reported</u>	<u>Ranking of the Average</u>	
2.92	2	Professional networking, a community of financial aid colleagues
2.23	1	High quality training opportunities

4.81	4	Higher level dialog that the state association conferences (more to learn for Directors and A.D.s)
6.57	9	Mentoring opportunities
5.34	6	A conference that is friendlier and often cheaper than the NASFAA Conference
4.22	3	Peer training, not just DOE training - so can cover things that FSA doesn't (like enrollment management, running a FAO, operational best practices)
6.274	8	Participation in important legislative advocacy efforts
7.20	10	A quarterly newsletter and active listserv that allow constant communication with your peers (financial aid news, relevant articles, job postings)
6.271	7	Volunteer opportunities
4.94	5	Leadership development, particularly for young FAAs

Imagine SASFAA was the only source for professional development available. What would you want the association to provide to you?

All the reg training
Annual Conference
Annual conference, webinars, listserv.
As much info on aid as possible
Best practices collection and distribution to the membership to help semi-standardize responses to new legislative requirements.
Big picture synopsis on how to strengthen the profession.
Continue the wonderful training that you currently provide.
Continued fed presence at conferences.
current regulatory information in layman terms
Decision making within the context of regulatory implications
Development from Professionals in their fields, not FA officers. This would bring about new thinking and not the same old thinking.
DOE training/federal updates
DOE trainings in combination with peer-led trainings. The extended, intense new aid and mid-level workshops are invaluable.
Everything that is currently offered and training sessions that are more indepth and detailed about HOW to do things, including training on DOE products such as Ed Express, Ed Connect, COD, NSLDS, etc.
Exactly what it offers currently.
Exactly what someone needs to know about a Financial Aid office. I am a "one man show" so I needed to know EVERYTHING...e.g. PPA and what it is, IPED etc...
Extensive training
Federal and peer training
federal compliance
Federal Training and Enrollment Management Training
Federal training and for Directors and A. D.s best practices for running a fa office.
Federal Updates

Great training and Federal updates!
High level training on hot topics
High level training.
High quality training
High quality annual conference and multiple webinars throughout the year.
High quality training for both new aid officers and seasoned officers.
higher level training than the state conferences - aimed at more experienced staff
I can't think of anything above what is being provided at this point in time.
I think SASFAA does a great job (compared to other FA Associations) of listening to the membership and adjusting to the economic and political climate. I think we need to tighten our belts and work w/in our budgets. But, SASFAA seems to be doing a good job of thinking thru those issues.
I think SASFAA has done well and is responsive to needs.
I would like to see SASFAA pursue more electronic training initiatives - such as webinars - for there members. The reduction in cost to attend such a session would maximize the attendance. For these webinars no cost should be assessed.
If that were the case then you already have the model - it would need to substantially supplemented with experiential and web-based educational opportunities and events.
In that case everything from training for operations, regulations, legal aspects, communication with students, peers, and management, office administration, ethics, IT, development, etc.
Information on the managing office staff not just managing the regulations, such managing difficult staff, strategic planning, organizing priorities to better meet the demands of the position, etc.
Keeping you updated on changes in FA
Leadership related initiatives
Leadership training
Legislative updates and implementation strategies
Legislative Updates; Professional Networking; Conference / Training Events;
Mentoring, Networking, Peer Training
More discussion on efficiencies within an office. How to streamline processes.
n/a
Networking and Training.
Networking opportunities.
Networking, training, upper level dialog, annual conference
New aid officer training
New Aid Officers Workshop - then work in association with ED to have additional continued training
New Aid, Access to Federal Training Updates and Resources. Best

Practices
New law requirements and updates.
New officers training on all TIV programs. Federal updates and sessions on these changes. Best practices.
New Officer's training, re-training of seasoned individuals, specific training for a variety of roles within the FAO, i.e., Assoc, Asst, Counselors, Processors, Clerical, etc.
Pertinent training at all levels, especially by sector.
professional training to keep current on all areas of the profession
Professional Networking, High Quality Training, and Leadership Development
Professional training
regulatory and legislative training & updates; personal and professional enrichment; networking opportunities
Regulatory Updates, opportunities for personal professional development
SASFAA should not try to compete with NASFAA but rather figure out where it can fill in where NASFAA is thin
Sessions on timely topics with round table discussion (small groups).
Something similar to the current conference.
state-based training opportunities - come into each state and provide localized training
The ability to stay abreast of issues facing the region and dialogue with my peers.
The go-to source for training.
The very best in updated training information, a forum to discuss related matters with my peers , an environment that is conducive to learning as well as temporary stress relief from the day-to-day financial aid grind.
Timely information on regulations, legislation, professional development
Timely, up to date information on changing regulations
Training
training
training
Training
Training and Information
Training from DOE and FA professionals.
Training opportunities for professional development; a opportunity to develop colleagues; voice in legislative issues.
Training opportunities; ask regs function; Networking opportunities; who to call for what resources.
Training, mentoring and leadership skills
Training, training, training. SASFAA has excellent sessions at its annual conference-- a wider variety than at state conferences with a bigger exchange of ideas.
training; federal updates; networking with colleagues
up to date information
updates on current topics

UP-to-date training
Webinars with free training during traditionally slower work-flow times.
Active Listserv, Face to Face conferences, Strong focus on new people, strong focus on continuing education of all. Focus on office efficiencies training with exposure to systems of others.
All of the above are very important. Rating them 10-1 is very difficult. Opportunities to meet with other colleagues and regulatory updates are vital to the membership.
High level training on fin aid issues
High quality training opportunities Professional networking Annual Conference
If they were the only source available then they should do a conference that is rich in training and networking opportunities.
More webinars and trainings
Similar to current offerings
The most relevant training/information in the shortest time frame format possible (making it less expensive and fitting more easily into very tight work schedules).
Updates from the FED and job opportunities. A listing of FA professionals and their specialty. School sorted by software provider and type.

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

Don't become a mini NASFAA. They have lost touch with whom they are to serve, unfortunately, and too political. SASFAA has a higher calling to help all groups of aid administrators to work with each other to serve students. It is not just postsecondary institutions, but also non-profit organizations, state agencies, rehab agencies, etc that can network to make postsecondary education a reality.
Good idea to seek this input.
Great job SASFAA.
I have always viewed SASFAA as being the best Association, smaller and more personable than NASFAA, but larger than the state Association, in the sense that it provides one with the networking opportunities for a more diverse population of aid administrators.
I strongly believe we should consider offering the annual workshop alternating years due to cost measures and the FSA training
In the "Dues" section, I am unable to offer a response without knowing if these types of structure are good for the financial stability of SASFAA.
Legislative advocacy should be either at the National or the State Association Level. Regional legislative advocacy for financial aid makes no sense.
n/a
no
No
No

none
Not right now...I would like to see the results of this survey before commenting further, but appreciate the opportunity to do so.
One of the questions on the first page, Select which of these you have attended, is mandatory, however I was unable to attend any last year and that is not an option. It will skew your data a little bit.
Please remember that lenders are just as stretched as anyone in this economy. I've seen some FAA's just try to move expenses onto lenders vs. membership and that isn't appropriate. Also, please remember (and I know that our leadership has been mindful of this in the past) that lenders are members of the association. We pay dues/registrations/sponsorships. We should have a voice and advocacy just like any other member. Thank you for this survey. It shows what a leader SASFAA is in this ever-changing landscape. You go out to members. I wish others did that.
Provide profiles of leaders in the profession. There's at least one in each state.
SASFAA has always been a great resource for all of us. Lets not let money dilute the spirit of SASFAA.
SASFAA has it's place. We just need to determine our role and then deliver to the membership.
SASFAA is great. Keep up the good work.
SASFAA is such a valuable resource to FAAs that needs to continue to offer the high level of interaction and knowledge-based information in a continuing climate of change and uncertainty.
SASFAA ROCKS! Good luck to you as you face these challenges. I know you will work through it successfully.
The meal functions at the annual conference are important, but could be scaled down to a smaller menu, or not such expensive menu items. The food should not be the focal point of these gatherings, but the opportunity to meet and know our colleagues, so that we have points of contact through out the year.
The need for training varies with reauthorization & new fed regs; some years aid is stable & other years we need all the training opportunities we can get. It makes it harder for planning but might provide a background for shortening some conferences and lengthening others.
When members volunteer, it appears there is a selection process, its all about who you know.
You're doing a good job. Thanks
budgeting should reflect training/activities that benefit the membership and not operations.
SASFAA is a great organization; however, it needs to do more to encourage participation in leadership roles. SASFAA has had some diverse representation on its elected Board over the years, but no diverse representation has occurred in the office of President. It has been 10 years since SASFAA has had a person of color serve as President. Why is that?
SASFAA is important and I hope that we will continue to provide training opportunities with some adjustments in the luxuries we have had in the

past.

We all need SASFAA. But our current budget situation makes access to the organization's normal services unaffordable for many institutions at this time. Just as all of us are doing on our campuses, SASFAA needs to do two things. First, it needs to explore avenues of providing the best, most relevant, and most economically possible services in the short term given the loss of revenue due to the shift in the student loan business and the tight budgets of the membership. That may mean curtailing and changing some services in the short term. Second, SASFAA needs to exercise patience until this economic crisis is over after which the organization can return to full services and will be a fully vibrant player in serving our great profession and region. Thank you to our SASFAA leadership for doing all they can in the current climate!!!

Leadership and Mentoring Report
Heather Boutell

Summary of Activities

GAP 15: Conduct the Leadership Symposium as a part of the Annual Conference.

LRP 5.2: Establish a SASFAA leadership workshop for developing state member officers and leaders which may be held at a state conference or the SASFAA annual conference.

Activity: Once approved, the Committee will schedule a conference call, and talk about what all we can accomplish with some variation of a Leadership Symposium at the Annual Conference in Jacksonville, FL. Once the budget is approved, the Committee and Chair will understand our parameters and what we can do.

The Chair also plans to talk with the state Presidents and get a list of the Presidents-Elect and Treasurers and reach out them to encourage them, congratulate them, and offer any resources they need. The Chair also hopes to hear from state presidents to hear of other ideas or needs that could help develop leaders in their states.

GAP 22: Continue to use the annual conference to mentor new members and leaders. Remember the term "new Members" is not limited only to members new to the financial aid profession but may include seasoned aid professionals new to the SASFAA region.

LRP 6.7: Provide mentoring opportunities for new members.

Activity: The Committee plans to work with the Membership Chair to identify when new members join SASFAA. The goal is to create a group of individuals that are willing to contact new members to the SASFAA region throughout the year. These new members could include seasoned professionals or brand new aid administrators. It is the hope that the Board will step up and be willing to connect with at least one new member. At the conference, we will have a time for these new additions to SASFAA to meet with their mentors to talk about their experiences in the Southern region thus far.

The Committee will work together to create a few sessions at the Conference, at the needs of the Conference Committee, on leadership development or mentoring.

Discussion

Approval of Leadership and Mentoring Committee Members:

Heather Boutell, Chair, Bellarmine University, KY (2nd Symposium President)

Michael Bennett, St. Petersburg College, FL (Former NASFAA Chair)

Brenda Brown, University of Miami-Law, FL (1st Symposium attendee)
 Missy Lutz, Newberry College, SC (2nd Symposium attendee)
 Brent Tener, Vanderbilt University, TN (1st Symposium President and 2nd Symposium Committee member)
 Todd Woodlee, NSLP, TN (2nd Symposium Presenter)

ATTACHMENT B
Vendor/Sponsor Recommendation
Hyatt Regency Jacksonville Riverfront
August 6-8, 2010

SASFAA Training Activities and Advertising Opportunities

Note: First-time exhibitors at the 2011 Conference shall receive a discount of 25% off the below Exhibitor Fees and Training Packages. Contact the Sponsorship chair for more information.

Training Packages

Commodore's Package \$6000 (change from \$7500)
 2 Conference Exhibit Booths
 Priority Booth Location (by date)
 On-line Conference Support Recognition
 Web Banner Ad for Fiscal Year
 1/2 Page Ad in All Newsletters
 1/2 Page Ad in NAO Workshop Program
 New Aid Officers Sponsorship
 Mid-Level Workshop Recognition

By purchasing this package, you will save \$2400 on your total package versus sponsoring each item individually. All items listed in the package are training activities and/or advertising opportunities.

Admiral's Package \$5000 (change from \$6000)
 Conference Exhibit Booth
 On-line Conference Support Recognition
 Web Banner Ad for Fiscal Year
 1/2 Ad in All Newsletters
 1/2 Ad in NAO Workshop Program
 Mid-Level Workshop Recognition

By purchasing this package, you will save \$1400 on your total package versus sponsoring each item individually. All items listed in the package are training activities and/or advertising opportunities.

Captain's Package \$3500 (change from \$4250)
 Conference Exhibit Booth
 On-line Conference Support Recognition
 Web Banner Ad for Fiscal Year
 1/4 Ad in Two Newsletters

By purchasing this package, you will save \$600 on your total package versus sponsoring each item individually. All items listed in the package are training activities and/or advertising opportunities.

Conference Sponsorship Opportunities

Our annual training conference will be held February 13 – 16, 2011, at the Hyatt Regency Jacksonville Riverfront in Jacksonville, FL.

Advertising Opportunities

[] New Aid Officer Worskhop Ad \$500 Half Page

- Ads will be black and white and content is provided by advertiser
- Placement of ads will be at the discretion of the Vice President
- Ads may be limited due to space and will be honored in order of date web-based sponsor form is completed

News letter Ads

- Ads will be in color and content is provided by advertiser
- Placement of ads will be at the discretion of the Newsletter Editor
- Ads may be limited due to space and will be honored in order of date web-based sponsor form is completed
- Ad Copy should be sent to the Newsletter Editor by the 10th day of the month preceding the publication date.

[] Full Page Newsletter Ads \$500/ Issue

- [] Fall Issue
- [] Winter Issue
- [] Spring Issue
- [] Summer Issue

[] Half Page Newsletter Ads \$300/ Issue

- [] Fall Issue
- [] Winter Issue
- [] Spring Issue
- [] Summer Issue

[] Quarter Page Newsletter Ads \$200/ Issue

- [] Fall Issue
- [] Winter Issue
- [] Spring Issue
- [] Summer Issue

Newsletter Editor
Please send digital ad copy and web link to:

[] Web Banner Ad \$1200 for Fiscal Year

- Ads will be in color and content is provided by advertiser
- Placement of ads will be at the discretion of the Electronic Services Chair