

SASFAA Annual Report

2014-2015

Southern Association of
Student Financial Aid Administrators, Inc.

June 2015



Prepared by:
Nathan R. Basford, Jr.
SASFAA President, 2014-2015
In Compliance with SASFAA Bylaws, Article VII, Section 1

SASFAA Annual Report 2014-2015

This annual report is a review of the activities of the officers, state presidents, and committee's for 2014-2015. It also serves as the President's report to the SASFAA membership. This report summarizes the goals established by each of the officers and committee chairs, and will focus on highlights of their accomplishments. The entire Executive Board, including elected officer and committee chairs, should be commended for their achievements this year.

President

Nathan Basford (Florida State University, Tallahassee, FL. 4 Year Public)

The 2014-2015 SASFAA Board and committee chairs met to transition on June 9th 2014 immediately following the final meeting of the 2013-2014 Board. We did a team-building exercise titled "Clock Questions" that Past President Brad Barnett had used at his Transition Board meeting in 2011 and Zita Barree last year... It was an opportunity for the 2014-2015 Board to get to know one another better as well as a way to obtain everyone's input regarding SASFAA specific questions and issues. I went on to use the "Clock Questions" for two more of our Board meetings during the year to continue our team building and address additional concerns.

During the Transition Board Meeting, we also held Board orientation, explained expense reimbursement procedures, discussed the SASFAA calendar, and reviewed a proposed budget for 2014-2015 and discussed goals and objectives. Since the 2014-15 Board did not become official until July 1, 2014, there were no actions taken but it was a great way to do pre-planning for the New Year and also to allow officers and committee chairs to transition with their 2013-2014 counterparts.

I was able to attend my first NASFAA Board meeting as an observer in November in New Orleans Louisiana. It was an experience that I enjoyed very much, and look forward to having a voice on the board in 2015-16. Having the opportunity to meet with the NASFAA staff, the in-coming and past NASFAA chairs and the regional presidents was an opportunity to share ideas, successes and challenges within our respective associations.

My second NASFAA Board meeting as an observer occurred in Portland, Oregon, March 23-24th, 2015. This was again another opportunity to meet with the regional presidents, and continue to observe the NASFAA Board proceedings.

I look forward to serving as a voting member on the NASFAA board for 2015-16. As having a voice at the table, I will be providing updates from those meetings to the SASFAA membership. I welcome any comments, thoughts, recommendations, etc. that you may want addressed with NASFAA. As always feel free to email me at nbasford@fsu.edu with your comments.

I had the honor of serving on the NASFAA Conference Mentor Task Force this year. This committee worked with serving as a mentor for our first-time attendees and assist attendees throughout the conference.

SASFAA's first executive board meeting was held in Memphis Tennessee, July 25-27th at the Peabody Hotel. At this meeting we passed a balanced budget of \$409,725 for the year which includes \$124,000 for Professional advancement which includes our Summer NAOW, our Leadership Symposium, as well as our pre-conference workshops during our annual conference. The budget also included \$7000 for our Long Range Planning committee which will begin reviewing and creating a blueprint that is filled with specific strategies and tactics designed to meet stated objectives of SASFAA. The work being done this year will ensure a bright horizon for the years to come.

During our first board meeting we took time to begin discussion on the book that was given to each board member at the transition meeting: "Road to Relevance: In discussing the book we used the clock game that we used at transition. In doing this activity the members of the board had to answer questions from the chapters we had read. Below are the questions & answers:

- Question: If we were to ask our members to identify the one thing that we do that helps them the most, what would it be?
- Answer: All participating agreed that the NAOW, Professional Development, Networking opportunities, and most important training were the things that we do that helps our members the most.

- Question: What are our strengths and what can we do to improve them?
- Answer: Again all agreed that it was our Members, our Leadership and our Advocacy are our strengths and that we continue to improve by getting others involved so that we can move forward with new ideas and opportunities to our members.

- Question: If we asked our members to play a word association with us, when we say SASFAA Association, what word or phrase would immediately come to mind?
- Answer: Inclusiveness, Advocacy, Training

- Question: What are our resources?
- Answer: Our seasoned members, their knowledge of why and who we are. Our Training and Our Members!

Our second board meeting was held November 2-4 in Fort Lauderdale, Fl. During that meeting, we approved the location of the 2015 SASFAA NAOW, (Crestview Hills, KY) the instructors, and the approval of the instructors contracts. We also continued the discussion of the possibility of the VP of training being a two year position, and after much discussion we decided to continue research, and will hopefully have a decision during the 2015-16 year.

We also approved fee structure and membership classifications to include retirees and individuals from out of region. (Presented to the membership and passed).

Our third Board meeting was held February 21, 2015 in Memphis, Tennessee. This meeting was linked with the annual conference.

As the year continued I had an opportunity to visit many of the state conferences, for those that I attended, I was able to provide the SASFAA update, as well as present sessions at the individual conferences. Due to several state conferences overlapping; Zita Barree and Amy Berrier assisted in attending those that I was unable to attend. My thanks to them for providing the SASFAA update as well as presenting.

It was an honor to be able to attend the state conferences and I appreciate the hospitality that was shown throughout my visits. In reflecting back on the year I noticed the theme from each of the conferences were about: Hope, the Future, the Past, being bridges, dipping our toes in the water, gathering jewels, etc. We as financial aid professionals relate to each one of them. We encourage hope, we look to the future, and in looking to the future we look at the past to ensure that SASFAA continues to move forward in the years to come. As financial aid professionals we become bridges for students and parents in the financial aid process, and in doing that we have to wade thru waters, such as federal regulations to ensure that we are up to date on the rulings so that we can serve our students and parents. At the end of the day or semester we look back and see the jewels; the students, who will walk across some stage and receive their college diploma. We continue to make a difference!

My last official board meeting was held June 8, 2015 at the Trade Winds Resort in St. Pete Beach, Florida. It was hard to believe that just last year we were there beginning to set goals and objectives for 2014-2015 and now we were there to pass the gavel and move forward with 2015-16. During our last official meeting we reviewed the GAP committee assessment and also discussed recommendations on the election process. As immediate past president for 2015-16 I will continue to move forward with the recommendations on the election process, and will keep the membership updated. We also approved to start providing membership certificates to our members upon request. We also worked on the Policy & procedure recommendations for the Treasurer-elect position. More information will be provided during the 2015-16 year.

As our meeting concluded, and it was time to pass the gavel to Amy Berrier, I took time to thank each and every member of the board for their dedication and support. The state presidents did an awesome job of coming together to address issues within their states as well as serve SASFAA in making a difference. All committee chairs tackled their task and goals and for that we have had a very **successful year**. VP Marian Dill has worked to ensure that training remains the top priority to you our members.

I have enjoyed the honor and privilege of serving SASFAA, and hope that our theme for the year, "Uncovering our Purpose, Power, & Passion" was seen throughout the year by you the members.

A summary of many of our accomplishments from board members, committee chairs and other SASFAA members and volunteers is included below.

If you have questions about any of the activities conducted by SASFAA please do not hesitate to contact me at 850.644.2675 or nbasford@fsu.edu.

Immediate Past President

Zita Barree (Hampton-Sydney College, Hampden-Sydney, VA. 4-Year Private), as Immediate Past President, was responsible for Nominations and Elections, professional recognition and awards, and compilation of the Governance and Planning (GAP) report.

The Nominations and Elections Committee worked extremely hard to identify qualified candidates for SASFAA elected positions. Information was provided on the SASFAA listserv, SASFAA Nine News, and SASFAA Website informing the membership about the upcoming elections. Details about the online voting procedures, photos, bios and candidacy statements were also available on the website and SASFAA Nine News. Online voting commenced 10 days prior to the annual conference. Candidates were Marian Dill

from Tennessee and Sharon Oliver from North Carolina for the office of President-Elect, Michael Morgan from Tennessee for the office of Vice-President, and Jenelle Handcox from North Carolina and Paul Mittelhammer from Georgia for the office of Treasurer. Marian Dill was elected President-Elect, Michael Morgan was elected Vice-President, and Jenelle Handcox was elected Treasurer. I would like to thank all of the candidates who ran for office and sincerely appreciate their volunteerism and desire to serve the association and its members.

The following awards were presented at the annual conference:

- The SASFAA Distinguished Service Award was presented to Heather Boutell, Bellarmine University, Kentucky and to Jeff Dennis, Greenville Technical College, South Carolina
- Sandy Neel from University of Louisville in Kentucky was presented the NASFAA State and Regional Leadership Award by NASFAA National Chair Eileen O'Leary.

The GAP committee held an in-person meeting in mid-May to compile the annual report. The GAP report is available for review on the SASFAA website.

In addition to this standard information, Zita also helped re-format the GAP spreadsheet, served on the NASFAA Board as the SASFAA voting member, and still working to finalize the operational calendar.

My thanks and appreciation to Zita for her dedication and commitment!-President Basford

Vice President

Marian Dill (Lee University, Cleveland, TN. 4-Year Private), Vice President, was responsible for the professional advancement (i.e. training) activities of the Association. The majority of Marian's work, and the work of the Professional Development Committee, occurred at the SASFAA New Aid Officer's Workshop. The week workshop was held from June 14-19 2015 on the campus of Thomas More College, Crestview Hills, KY. There were 77 participants this year and 10 SASFAA members were selected as faculty and represented a cross-section of the membership and institution types. Four SASFAA members were selected to assist the Vice President, Curriculum Coordinator, and Local Arrangements Coordinator, with on-site activities and functions at the workshop. Assistance during the week was also provided by David Bartnicki, a U.S. Department of Education training officer.

Other training opportunities offered during the 2014-15 year:

- New Aid Officer and Mid-level workshop during our annual conference in Memphis, TN.
- Leadership Symposium held in Birmingham AL (November 2014)

Marian along with her committee, and the instructors, staff is to be commended for providing quality training for SASFAA's new aid professionals this year. The New Aid Officer training has always been a hallmark for our Association and the tradition continued this year. Kudo's to Mary Givhan, a SASFAA Past-President for being such a gracious host during our time at Thomas More College. Kudo's also to the entire staff at Thomas More.

We are hoping to look at a two year contract with the site location for the summer NAOW in the 2015-16 year. This will get us back on track with rotation of locations and will give us a year out to select future sites.

Marian has served the association well, and I appreciate her dedication & commitment.-President Basford

President-Elect

Amy Berrier (UNC Greensboro, 4 Year Public) was very busy during the year making preparations for the upcoming year in addition to many other responsibilities. I look forward to working with Amy this coming year as she leads SASFAA forward.

- Served as the Parliamentarian for 2014-2015. Introduced a motion that would move the role of Parliamentarian to the position of Immediate Past-President for beginning with the 1516 year. This bylaws change was approved by the membership at the February 2015 Annual Conference.
- Introduced a motion that would create the position of Treasurer-Elect for the SASFAA Executive Board. This bylaws change was approved by the membership at the February 2015 Annual Conference. The first treasurer-elect position will be on the ballot during the February 2016 Annual Conference.
- Conducted an all-day workshop/orientation for the state presidents-elect on Sunday at the Annual Conference.
- Worked with the current NC State President, incoming Local Arrangements Chair Janet Nowicki, incoming Conference Chair Brenda Burke, and other NC members to promote the 2016 Annual Conference scheduled for February 7-10, 2016 in Greensboro, North Carolina
- Worked throughout the year to finalize the selection of my committee chairs for 2015-2016. I also assisted committee chairs in selecting members to serve on their committees for 1516.
- Worked with the current SASFAA President in planning the June 2015 transition meeting in Florida.
- Worked closely with President Basford and Past President Barree on many issues that we were faced with in 2014-2015.
- Met with the sales staff at the Sheraton Four Seasons in Greensboro, NC with Site Selection Chair Tracy Misner, incoming LAC Chair Janet Nowicki, incoming Sponsorship Chair Brenda McCafferty, and incoming Conference Chair Brenda Burke. Under Tracy's direction, we were lucky enough to secure the premium hotel space at the Sheraton for the 2016 Annual Conference.
- Assisted in creating/revising policies and procedures for the bylaws changes that were approved in February 2015.
- Attended the NASFAA Board Orientation in March 2015 in Washington, DC
- Attended the NASFAA Leadership and Legislative Conference in March 2015 in Washington, DC
- Conducted Hill Visits with staff members in Senator Richard Burr's Office (R-NC) and Congresswoman Virginia Foxx's Office (R-NC)

Amy's comments: *"I have enjoyed serving as SASFAA President-Elect during the 2014-2015 year under President Basford's Leadership. The 1415 Executive Board had a very productive year and I look forward to continuing that momentum into 2015-2016."*

"It has been a pleasure working with everyone on the SASFAA Board this year. I have enjoyed working so closely with President Basford and Past President Zita Barree. I look forward to continuing this momentum

into the coming year. I know that I can count on having all of your support as we continue to lead SASFAA together in the coming year.”

Amy, I look forward to serving with you this coming year.-President Basford

Secretary

Vicki Adams (Jacksonville State University, Jacksonville, AL. 4 Year Public) Vicki has:

- Reviewed the Policy and Procedures Manual for corrections and made necessary revisions throughout the year
- Mailed sympathy and congratulation cards on behalf of the SASFAA Board to SASFAA members and their families as requested and needed.
- Prepared all Board Minutes and sent to the Electronics Chair for posting to the SASFAA web site.
- Compiled all reports for the Board meetings and disseminated the compiled reports electronically before each meeting.
- Bylaws recommendations and approvals by the Board were submitted to the membership for a vote prior to the annual conference held in February 2016.
- Assured that the records are secure and easily assessable to any board member as needed.

Vicki's comments: *“This year has been a very rewarding experience for me. I have enjoyed serving under the leadership of President Basford, and look forward to the 2015-16 year.”*

Thank you Vicki for your dedication and commitment, I look forward to the coming year.-President Basford

Treasurer

Amy Moser (Georgia – Servicer) completed her two-year term as SASFAA Treasurer. Her responsibilities and accomplishments included:

- Created and maintained annual operating budget.
- Used PayPal to its fullest potential offering online payments and reporting to our members for membership, conference, professional development and sponsorship fees.
- Worked with the CPA firm to successfully file the 990 and 990-T for the past fiscal year.
- Paid all bills and reimbursements in a timely manner
- Balanced checking and savings accounts
- Maintained 3rd party vendor contracts including but not limited to Wild Apricot, BMI Music, ASCAP, PayPal, and the State of Georgia.
- Utilized QuickBooks Online to allow the necessary people to have anytime access to budget information or fund information.
- Most importantly, spent two days with incoming Treasurer to ensure a smooth transition.

Amy continued a timeline for providing budget line updates to Board members and committee chairs who had responsibility for specific lines of the SASFAA budget. The job of the Treasurer is a voluntary one and crucial to the long-term fiscal stability of the association. The hours that are required to perform all of the necessary duties are numerous, especially at peak processing times. Amy performed her duties accurately and timely and with a great deal of diligence and enthusiasm.

Amy's comments: *"It has been my extreme honor to serve as your Treasurer. I appreciate your kindness and patience through a very trying year. Mr. President, I will treasure your sense of humor, your laugh, and your innate ability to encourage and uplift. Cheers!"*

State Presidents

Stephanie Miller (AL) Stephanie –Watson-Lawrence (FL) Susan Smith (GA) Kristie Hughes (KY) Carrie Cooper (MS) Cathy Shell (NC) Kenneth Cole (SC) Celena Tulloss (TN) Tarik Boyd (VA)

The state presidents have essentially two goals as they serve on the SASFAA Board. These goals include:

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

The State Presidents represented not only their respective states well, but also always kept the best interests of SASFAA in the forefront. They were very active this year by attending Board meetings in-person, and via conference call, to represent their members within SASFAA and actively communicate issues and concerns to the President and the Board. If for some reason a State President was unable to attend a meeting, they appropriately designated another individual on the board to represent their state. The State Presidents served with dedication, a great sense of teamwork and a lot of humor. They each participated in the State Presidents Exchange Program. This program allowed each of them to visit other state conferences to encourage members to get involved and to become leaders within their state association as well as in SASFAA.

Additionally, this year, the State Presidents decided to take on a project of their own as well as offer to participate in and present sessions at each other's annual conference. Their project was to put together a presentation on the importance of getting involved in your state and regional association. Each state president provided input and the final product is fantastic. The presentation was used during the state conferences this year, and will be submitted for a possible NASFAA Star Award next year. The state presidents held meetings before each on-site board meeting to discuss issues within their states and also to come together with any concerns to bring before the board.

State President's Comments:

"Thank you for the experience. I have enjoyed serving on the SASFAA Board and look forward to working with you all again in the future." - Stephanie Watson Lawrence, Florida State President

"It has been an honor to work with each of you on this year's SASFAA board. I am deeply appreciative of the support and camaraderie of this group, as well as thankful for SASFAA's support of the State President Exchange. Thank you SASFAA for the opportunity to serve!"- Celena Tulloss, Tennessee State President

"It has been an amazing year, Thank you to everyone; it has been my honor and please to serve with you on the SASFAA Executive Board".-Stephanie Miller, Alabama State President.

"I have truly enjoyed being the GASFAA Representative on the SASFAA Board this year. The experiences and support from the Board members have been phenomenal."- Susan A. Smith, Georgia President

"It has been a tremendous pleasure to serve on the SASFAA board with such a great group of folks. I feel that we have accomplished great things this past year and have particularly enjoyed the state presidents' work for the State Presidents' Exchange and the close-knit relationship we share among the state presidents. The wonderful people who make up this board are now like a second family to me and I am thankful for the opportunity to serve SASFAA with you all." –

"On a personal note, it has been an honor and a privilege to serve on the SASFAA board this year with you and I have truly enjoyed the experience. I will be forever grateful for the newfound friendships. Thank you for being a great leader and an even better friend, Nathan!"- Kristie Hughes, Kentucky State President

"It has been a wonderful year and I am truly blessed to have met such a wonderful caring group of people. The opportunity to serve this great association with each of you has been great and thank you for all of your support."- Carrie Cooper, Mississippi State President

"Mr. President, you have been such a wonderful mentor and have provided so much support to me this year. It has been a privilege to serve as the 2014-15 NCASFAA President and on the 2014-15 SASFAA board. I have made new, life-long friends and have grown both personally and professionally."– Cathy Shell, North Carolina State President.

"My time on the SASFAA board was most enjoyable under Nathans leadership. During the year communication was effective and having Sarah as our State President Liaison was helpful as we can all get caught in our own dealings with our state. I know there was discussion regarding the need for that position; I think if the position will be eliminated there needs to be more time spent with the state presidents so they are made aware of their expectations. Most of us had never served on the SASFAA board and there are some differences from our state. Overall it was a rewarding experience and wouldn't trade it for anything. I enjoyed working with everyone and look forward to future dealings."-Tarik Boyd, Virginia State President

"Serving on the SASFAA Executive Board under the leadership of Nathan Basford has been an invigorating and rewarding learning experience. His implementation of a State President Liaison position proved satisfying for the growth and development of the nine state presidents. We all worked together this year in service, not only to our state, but to our regional association as well. I have grown and matured as a state association leaders, and have implemented changes from the assigned text' "Road to Relevance". I am appreciative of the knowledge afforded to me by my service on the SASFAA Board this year and I look forward to additional leadership opportunities."-Stephanie Lawrence, Florida State President

Conference Committee

Chris Tolson-Mapes (Campbellsville University, Campbellsville, KY. 4 Year Private) served as chair of the committee. The 52nd SASFAA Annual Conference was held at the Peabody Hotel, Memphis TN, February 22-25th, 2015 (once we weathered the winter storm of snow & ice). The conference theme was "Uncovering our Purpose, Power, & Passion". Chris along with her committee did a fantastic job to ensure

the conference was a success. We were excited about being in the great state of Tennessee, and appreciated the hospitality that was shown to all visiting.

The following are some highlights of the 2015 Conference:

- A State President-Elects' Workshop was led by President-Elect Amy Berrier
- A pre-con workshop for New Aid Officers & Mid-level was held.
- The Conference opening session included the Presentation of Colors by the University of Memphis ROTC Color Guard, the singing of the National Anthem by Ms. Evvie McKinney from the Soulsville Charter School in Memphis.
- A welcome from Mayor A. C. Wharton, Jr.
- A Tennessee welcome from Celena Tulloss, TASFAA President, a presentation for our selected charity –The Big Oak Ranch and business meeting.
- Mr. John Croyle founder of the Big Oak Ranch was our keynote speaker and brought us a message of perseverance, encouragement, motivation and hope.
- A President's Reception was held following the opening session, which provided an opportunity for SASFAA members to connect and reconnect.
- A NASFAA Update was presented by Eileen O'Leary, current NASFAA chair and she also presented, the NASFAA Regional Leadership Award to Sandy Neel from the University of Kentucky.
- Janet Nowicki recognized the conference vendors...
- SASFAA favorite...bingo!!
- I passed the ceremonial gavel to Amy Berrier, President-Elect and she provided an update on her plans for the 2015-16 year. A Federal Update general session was conducted by from the Department of Education.
- Provided time for our resource partners to hold sessions for current clients and future clients talking about products they offer schools.
- 15 Past Presidents were in attendance.
- Despite the snow and ice that affected travel on the east coast, the attendance at the conference was 452 as compared to 528 for the prior year (which was held in Jacksonville, Florida).
- Conference came in under budget and evaluations were great. Suggestions and feedback from the evaluations have been passed along to the 2015-16 Conference chair.

Overall, the committee did an amazing job providing a conference with session content that matched the theme, the speakers were motivational and educational, attendance and vendor/sponsorship participation was strong, donations to the charity were impressive, and there were many positive comments about the conference.

I would like to thank Chris Tolson-Mapes, the Conference Committee, Local Arrangements Committee, Vendor/Sponsors, the speakers, and the moderators for making this such a great event.—President Basford

Global Issues Committee

Joan Bailey (USF Tampa, Florida 4 year Public) Joan did an excellent job in charring this committee, and I appreciate her dedication and support to SASFAA.

The Committee Goals for 2014-15 were:

- Seek representation for each state on the Global Issues Committee.
- Promote diversity and inclusiveness in the association.
- Provide training and information for all sectors - providing articles for the SASFAA Nine news.
- Work with the membership committee to explore possible utilization of retirees as a means to support upcoming young professionals providing helpful resources and a support system.
- Highlight Veterans Issues while promoting best practices.
- Bring attention to the available resources for DACA students.

The committee was diverse with representation from all states except Georgia who pulled out after being selected. The committee cost was minimal due to meetings being held via conference calls. Two sessions were offered by the Global Issues committee at annual conference and were well received. The goal of the committee was to have articles done for SASFAA Nine News by submitting at least one article per month. We did manage to submit a total of 6 articles/news bulletins. I also submitted two sessions for NASFAA Conference on behalf of the SASFAA Global Issue Committee.

Joan's comments:

“Overall, I am very impressed with the level of work being done by the board members to carry out the business of the association. The board members and conference committee members worked well together and had a very informative and action filled conference. Despite the weather challenges the conference was a hit. It has been an honor to be part of this group and I look forward to a continuing to serve the association and its members in any capacity afforded to me. Thanks to the president for allowing me to SERVE on the Board this year.”

Thank you Joan for all you have done this year!-President Basford

Electronic Services Committee

Angie Black (Kentucky, 4-Year Public) served as chair for the Electronic Services Committee. The goal of this committee per the Policies and Procedures Manual is to explore ways to enhance the internal and external communications of the Association using a variety of media, but with particular attention to the SASFAA website.

The overall goals of the 2014-2015 Electronic Services Committee were as follows:

- Maintain and enhance the SASFAA website.
- Serve as a support to functional areas of SASFAA including but not limited to membership, elections, sponsorship, conference, new aid officers workshop and other trainings.
- Monitor SASFAA's technical email account.
- Complete an operational calendar for Electronic Services Committee.
- Review the P&P periodically and submit recommendations for updates as needed.
- Monitor SASFAA's database security settings and apply updates as needed.

- Complete reporting for board meetings, the GAP assessment, and the President's annual report

Highlights of the accomplishments of this year's Electronic Services committee include:

- Completed a comprehensive web page and data load as a precautionary measure in preparation for a website upgrade.
- Implemented functional site map on the website and finalized the relocation of documents from the previous non-functional site map page.
- Continued web enhancements and page updates for consistency between pages, page names, layout and theme.
- Created new leadership web pages for the 14-15 executive board and each committee.
- Updated state web pages to reference current information.
- Collaborated with membership chair and treasurer in preparation for the start of the new membership year and made associated application and setting updates.
- Applied updates to database security settings for leadership transition.
- Addressed an issue with Wild Apricot technical support regarding the system duplication of a membership renewal email.
- Transitioned listserv management to SASFAA Communications Chair, per updates approved by the board in June. The Electronic Services Committee served in a backup/support role.
- Participated in board meeting via phone (conference call) in September to discuss matters pertaining to the Leadership Symposium and sponsorship packages for SASFAA's 14-15 membership year.
- Completed and submitted the Electronic Services operational calendar.
- Completed standard website updates including meeting minutes, P&P, and calendar as requested by secretary and granted direct access to the Secretary in the event that there is a need.
- Completed website enhancements including an edit to the SASFAA Nine News logo on the main page to match the logo on the blog and the addition of a Treasurer's Corner box on the main page to address frequently asked questions or other important information deemed appropriate by the treasurer.
- Updated web content for sponsorship packages to include most recent updates approved by the board and launched sponsorship registration.
- Launched Leadership Symposium webpage and on-line registration.
- Launched conference webpages and the on-line registration.
- Monitored SASFAA's technical email account and responded accordingly.
- Researched and reported a technical problem with Wild Apricot that caused SASFAA (and some other websites powered by Wild Apricot) to encounter a website display problem.
- Updated web content for conference webpages on an ongoing basis. Launched presentation page and sorted/formatted presentations in preparation for conference.
- Launched pre-conference workshops webpage and on-line registration. Generated and distributed reports as needed for workshop coordinators.
- Launched election webpages and completed setup, testing, and final launch of election on election host site (election buddy). Worked with membership chair on membership data review and development of the eligible voter list. Monitored membership database to identify newly qualified eligible voters and issued associated ballots during the election period.
- Updated general web content as needed, including updates to training dates/information and the addition of a President's Message section on the SASFAA home page.

- Launched new aid officers workshop webpages and on-line registration. Generated and distributed reports as needed for workshop coordinators.
- Applied updates for new banner ad cycle and post-conference sponsor recognition.
- Setup 15-16 volunteer form. Generated and distributed reports to incoming president.
- Met with membership chair and incoming electronic services chair via conference call to discuss to implementation of new membership categories.
- Prepared and submitted Electronic Services GAP report.
- Sought clarification and disseminated information regarding Wild Apricot plan and pricing changes.
- Prepared and submitted an end of year report to support the development of the President's annual report

Angie has worked tirelessly these past years to enhance SASFAA's website. Angie has done a great job with a very hard and complicated task and has done it with commitment and dedication. Thank you Angie!—President Basford

Budget and Finance Committee

Terri Parchment (Tennessee, Agency) served as Budget and Finance chair and her committee's charge was to ensure that the association remained financially sound. The financial stability of the Association is provided through careful and regular planning and evaluation.

The Chair, along with the President and the Board of Directors established an operational budget for 2014-2015 and managed the association's reserve funds. These reserve funds have been established to protect SASFAA in the event that the association is unable to meet its contractual obligations.

Activities conducted by the Budget and Finance Committee included:

- Completed an annual review of the financial records, which detailed the positive work of our Treasurer.
- Maintained the SASFAA Contract spreadsheet to review ongoing liability and to monitor hotel deposit amounts and due dates.
- Prepared an annual SASFAA budget for adoption by the SASFAA Board.
- Worked with the Treasurer and President to adjust budget line items as necessary.
- Updated Policy & Procedures with new Treasurer-Elect position information.
- Updated Guide to Financial Management section related to Treasurer annual review.

Terri has done an exceptional job as chair of the Budget and Finance Committee. I appreciate her dedication and commitment. —President Basford

Legislative Relations Committee

Sharon Oliver (North Carolina Central University, Durham, and NC. 4 Year Public) Sharon did an outstanding job of chairing this committee. Her dedication and commitment was much appreciated.

The Legislative Relations Committee monitored and shared legislative actions that were pertinent to the financial aid community. The greatest accomplishments for the legislative relation committee were

disseminating legislative actions, preparing a briefing statement for congressional visits that included concerns for all sectors, and disseminating legislative actions.

A summary of the accomplishments of the Legislative Relations Committee for 2014-15 are indicated below:

- There were fourteen (14) SASFAA members who met with eighteen (18) congressional representatives who serve on the House Committee on Education and the Senate Committee on Health, Education, Labor, and Pension (HELP). A general session was held with a high ranking representative from the Senate as well as the House of Representatives. A list of the members and representatives are indicated below:

Stephanie Miller (AL) and Bob Walker (MS)

Laura Hobbs for Bradley Bryne (H), Bob Moran for Lamar Alexander (S), Robert Scott (H), Alma Adams (H)

President Nathan Basford (FL) - (*Maureen Anderson (FL) was unable to attend due to a flight cancellation*)

Ashley Rose (H), Bob Moran, (S), Udochi Onwubiko (H)

Philip Hawkins and Christen Neher (GA)

Katie Hunter (H), Brett Layson (S), Bob Moran for Lamar Alexander (S), Robert Scott (H)

Erin Klarer (KY)

Rand Paul (S), John Duncan (H), Brett Guthrie (H), Robert Scott (H)

Lisa Koretoff, Sharon Oliver, and Wanda White (NC)

Whitney Riggs (H), Bob Moran for Lamar Alexander (S), Christopher Toppings (S), Alma Adams (H)

Jenny Hammett (SC)

Katie Hunter and Daniel Burn for Tim Scott (S), Bob Moran for Lamar Alexander (S), Joe Wilson (H), Tim Scott (S)

Ron Gambill and Celena Tulloss (TN)

John Duncan (H), Bob Moran for Lamar Alexander (S), David P. Roe (H), Senator Bob Corker (S)

Chad Sartini and Heidi-Hunter Goldworthy (VA)

David Brat, Bob Moran for Lamar Alexander (S), Robert Scott (H)

- Created a Hill Visit briefing statement with a summary of financial aid issues on FAFSA Simplification, Direct Student Loan Reform, Abundance of and Ever-Changing Regulatory Requirements, Perkins Loan Program, and General Recommendations.
- Prepared a Hill Visit article for the membership to view the highlights of the experience, please click her to view the article <http://www.sasfaa.org/Resources/Documents/SASFAAtakesDC.pdf>.
- Members were informed of legislative issues, there were over 18 articles disseminated through SASFAA Nine New, Listserv, Facebook and the Blog to cover the topics below:

- Loan Increase
- Why Should We Care About November?
- FSA Pin Eliminated
- Mechanics of the Federal Process/Understanding the Legislative Process
- Legislative Relations
- Final Regulations for Plus Loan
- Legislative Meetings and Events
- Poor Performing Career College Programs
- GOP Sweeps Congress in Midterm
- Alexander Q&A Proposed Chair of the Education Committee
- 10 Ways a Republican Led Congress Could Impact Higher Education
- Budget Deal Unveiled--Pell Increase of \$100
- Fact Sheet: A Student Aid Bill of Rights: Taking Action to Ensure Strong Consumer Protections for Student Loan Borrowers
- House Republicans Again Propose 10 Year Freeze on Pell Grant Maximum Award

- Submitted a request to the SASFAA Executive Board to allow non-school representatives to participate in the Hill Visits. Approval was granted by the Board.
- Engaged committee members throughout the year, all nine states were represented on the committee.
- Conducted monthly meetings with the Legislative Relations Committee by conference calls and held an in person meeting during SASFAA's annual conference in February.
- Developed a response to the Repay Act that included the input of all state associations in the SASFAA region.
- Participated in conference calls with EASFAA and MASFAA.
- Participated in regional federal issues conference calls.

Sharon's comments: *"Nathan, Thank you for taking the risk of allowing me to serve in a new capacity. It was a very rewarding experience. I will always be grateful to you for this wonderful opportunity."*

"SASFAA should continue to allocate funds in the budget to support Hill Visits in order to keep legislative representatives abreast of critical financial aid regulations that impact the lives of the students that we support and serve. If states and others would like to support Hill Visits, it would be great to send at least two representatives from each state."

Sharon has done an excellent job in making the Hill Visits a Success this year! –President Basford

Membership Committee

Nancy T. Garmroth (Converse College, Spartanburg, SC. 4 Year Private) was chair of this committee, and I appreciate her service in this role for 2014-15. She worked with her committee to encourage financial aid professionals to join SASFAA. Below were her committee goals and accomplishments:

- Review fee structure and membership classifications to include retirees and individuals from out of region.

- Establish mentorship program.
- Recognize new members.

Other highlights of the committee's accomplishments include:

- Changes to membership classifications approved during February 2015 voting.(retirees & individuals membership from out of region) Below is a chart showing the current membership numbers by state

State	Number
Georgia	234
Florida	173
Tennessee	153
South Carolina	146
North Carolina	133
Virginia	131
Alabama	87
Kentucky	67
Mississippi	63
Honorary with no State	25
Other	88
Total	1300

Nancy's comments:

"It has been my pleasure to work with you all this year. I am sorry my attention has been divided. I have been most impressed with this group of State Presidents and think SASFAA has very good potential leaders."

Thank you for serving SASFAA this year.-President Basford

Communications & Outreach

Jody Darby (Chattahoochee Technical College, Acworth, GA 2 Year Public Technical) Jody has done an excellent job in posting information to the membership. I appreciate his hard work and dedication. Below you will see the committee goals and the year-in-review:

Committee Goals for 2014-2015:

- SASFAA *Nine News* - Monthly Article (This month in History)
- Reduce duplication
- Help promote partner services
- Increase Facebook interactions
- Utilize states' communication means to accomplish SASFAA's goals
- Financial Appreciation Day! October 17th

Year in Review:

SASFAA Nine News:

- During 2014-2015, we posted 108 articles to *Nine News*. The most popular article was the registration information about the 2014 Leadership Symposium, posted September 25, 2014, 600 page views. Following it was President's Basford's comments on the President's State of the Union Address, posted January 21, 2015, 519 page views. Third most popular was from February 16, 2015, Conference Registration Reminder, 510 page views.
- Since the blog's inception in May 2010, the primary source of traffic is directly from SASFAA.org. Second to that, visitors come from Google.com.
- The audience for Nine News comes from more than solely the United States. The 'top countries' in terms of 'page views' are U.S., France, Russia, and Germany; however, over 90% of the page views originate from the U.S.
- Seventy percent of the page's viewers use Internet Explorer, and 87% of the viewer's use a Windows operating system.
- Due to the fact that people, in general, like articles with photos, etc., Nine News is a good outlet to be creative. It allows more flexibility with colors, fonts, etc. than does the listserv.
- Lesson learned: Although I reminded people of the schedule of article submissions from Policies and Procedures, I need to remind them more often so that the scheduled is adhered to.

Facebook page:

- The page has a total of 981 'likes' as of today, June 23, 2015. At the beginning of the year, July 1, 2014, we had 752. This equates to 229 people who, over the course of the year, have gone to SASFAA's Facebook page, 'liked' it, and are following the material posted—30% more than in the past.
- In many cases, in order to help the Nine News popularity, I would post to Nine News first, and then link over to it from the Facebook page. This way, people are getting information from multiple sources yet not duplicative.
- Some duplication is needed and unavoidable.
- The pages reach a large number of people—either directly, from people sharing with others, from 'friends' seeing it on someone else's page, etc. On July 7, 2014, we reached 1,823 people, 1,784 on September 29, 2014, 1,536 on January 31, 2015, 2,500 on February 12, 2015 (I personally paid for Facebook advertising as a donation to SASFAA).
- Since July 1, 2014, of all the visits to the Facebook page, 74% went to the Timeline where most information is displayed. 23% went to the Photos tab.

Listserv:

- During 2014-2015, 273 messages were sent via the listserv. 41% of those e-mails were job postings from member institutions.
- The listserv continues to prove to be a quick, easy way of getting information to the membership. The drawback is that it's text-only, so the messages can't be creatively constructed, etc.

Jody's comments: *"I have thoroughly enjoyed my year as Chair of the Communications and Technology Committee. I sincerely appreciate Nathan Basford for entrusting me with this role, and I hope I have done the association proud. I look forward to my continued work with SASFAA, and I appreciate all that Nathan has done this year for the Association and our members._Thank you for the opportunity to serve."*

"Thank you all for making my first year on the Board very enjoyable. You each have played an important role in what we have accomplished, and I am glad to have been a part."

Thank you for a job well done! You have a talent that is much appreciated!-President Basford

Site Selection Committee

Tracy Misner (Cape Coral Institute of Technology, Cape Coral Florida, Proprietary) Tracy has continued to serve SASFAA in negotiation contracts for site selections. She continues to research and find viable more affordable options when selecting site locations for board meetings, training opportunities, as well as conference locations. Tracy had done this with commitment and dedication.

The purpose of the Site Selection Committee is to identify sites that will provide a suitable physical environment for conferences, committee meetings, Executive Board meetings and professional development workshops.

Major accomplishments of the Site Selection committee included:

- A contract was finalized for the 2017 conference at the Beau Rivage in Mississippi. A Great contract with many concessions for SASFAA.(Looking forward to being in the great state of Mississippi)
- An addendum to the 2016 SASFAA contract in Greensboro was approved for new meeting space.
- A two year contract with the Trade Winds/ St. Pete Beach, Florida, was secured for the 2015 SASFAA Transition meeting and the 2016 Transition meeting.
- Contracts were secured for the Hill visits, long-range planning committee, GAP committee and SASFAA board meetings.

Tracy's comments: *"It has been a very busy and successful year. It was a year filled with many accomplishments and training opportunities for members. The association continued to grow and thrive under the leadership of Nathan Basford. It has been a pleasure to serve on the 2014-2015 Executive Board. It has been a pleasure to serve on the 2014-2015 Executive Board."*

Tracy has been such an asset to have on the SASFAA Board. Thank you for your service!- President Basford

Vendor/Sponsors Committee

Janet Nowicki (Guilford Technical Community College, Jamestown, NC. 2-Year Private) Janet chaired the Sponsorship Committee for 2014 -2015. Below is the list of our Sponsors:

Organization
Academic Works
Access Group
American Student Assistance
Charter One Bank
CMD Outsourcing Solutions
Discover Student Loans
ECMC
Edfinancial Services
Edsouth
Education Partners
ELM Resources
ERS Contact Center Solutions
FEDLOAN SERVICING (PHEAA)
Financial Aid Services
Financial Aid TV
SunTrust
Great Lakes Educational Loan Services, Inc.
Greenwood Hall
iGrad
Inceptia
KHEAA
LendKey - cuStudentLoans
MOHELA
National Student Clearinghouse
Navient
Nelnet
Next Gen Web Solutions
PNC Bank
Postlethwaite & Netterville
Sallie Mae
SoFi
Student Aid Services
TG HigherEDGE
U-fi Student Loans
USA Funds
Vocado, LLC
Wells Fargo Education Financial Services

Priority Training
First Time Sponsors

- This committee was charged by the Executive Board to accomplish several tasks this year. First and foremost was the goal of generating \$96,000 of income from our current and new Sponsors. I am very happy to report that the goal was achieved! We were able to secure over \$103K and even with refunds for **First Time Sponsor discounts**, we retained over \$101K.

After speaking with the First Time Sponsors, Janet feels pretty confident they will be returning for the 2015-16 year. (**Great News**)

- Secondly, Janet was charged with training the incoming Sponsorship Chair for 2015-16, Brenda McCafferty. Luckily she has been Chair at the State level so very little training was necessary. Janet shared all emails, documents, spreadsheets, email distribution lists, etc. with her to try and eliminate starting from scratch. They also discussed what worked and what didn't work for this year in regards to the conference and set-up, sponsorship levels and offerings.
- Thirdly, Janet went on site visits to the 2016 site and the 2017 site to ensure that the space allocated for exhibiting would be adequate. Janet recommends this be made a permanent part of the Chair's duties so that the exhibit area utilized will be the most advantageous for both the Sponsors and the attendees. With the site visit to the Sheraton, they discovered that the exhibit area would be extremely far away from the General sessions and meals. If we had not conducted that visit, we would have been negatively impacted and possibly have lost some Sponsors.

Janet should be commended for all her hard work on sponsorship this year and a special thanks also to her husband Walter who gave so much of his time throughout the year but particularly at the conference. The vendor/sponsors respect Janet highly and it is because of that respect that we are in our current position with having a strong number of exhibitors at our conferences.

Janet's comments: *"Thank you Mr. President for the privilege of serving as your Sponsorship Chair this year. It was truly a pleasure and I look forward to seeing you in sunny Greensboro!"*

I appreciate your dedication and service to SASFAA, and appreciate the service of your husband Walter also. -President Basford

Ad Hoc committee: Long Range Planning

Sandy Neel (Bellarmine University, Louisville, KY 4 Year Private) was appointed as chair this year to begin work on the Long-Range Plan Below are the committee Goals;

Committee Goals for 2014-15:

- Write a strong but easy to follow long range plan to get us to where we want to be in the next 5 years
- Survey the Board
- Hold Conference calls when necessary with Committee
- Hold Listening meeting at the Annual Conference to gather information from the members

- Gather Other state and regional association's Long Range Plan to read and see what we might want to use in our plan
- Hold in person meeting in May to begin the process of vetting a new Long Range Plan

The Long Range Planning Committee met on May 5-7, 2015 in Nashville, TN to review the Membership Surveys, Financial Records of the Association, GAP Reports, other State, Regional and NASFAA's Long Range Plan, information from the Listening Session and the additional survey as a result of the Listening Session. After careful review of these materials and lots of discussion we decided that the LRP would be divided into the following sections:

I. ORGANIZATIONAL STRUCTURE

- BY-LAWS
- BOARD OF DIRECTORS
- COMMITTEES
- MEMBERSHIP POLICIES AND PROCEDURE

II. COMMUNICATION

- COMMUNICATION

III PROFESSIONAL DEVELOPMENT

- PROFESSIONAL DEVELOPMENT
- LEADERSHIP

IV FINANCES

- FINANCES

V POLICY ADVOCACY

- LEGISLATIVE ISSUES

Sandy's comments: *"It has been a pleasure working on the Board this year and I am looking forward to finalizing the LRP so the 2015-16 Board can vote on it to be used starting in 2016-17."*

Thank you Sandy for your time and dedication. -President Basford

Ad Hoc committee: State Presidents Liaison:

Sarah Dowd, (Trident Technical College, 2 Year public) Sarah a Past-State President (South Carolina) was chair of this ad hoc committee. Sarah has provided the following year-end-report:

Under the direction of President Basford, the State Presidents formed a special ad-hoc committee with the goal of completing a project to construct a reference tool to help future state presidents transition to the

SASFAA Board. After discussion, the Presidents decided that this task was best accomplished within the transitions of the individual state transition meetings.

At the request of President Basford, the state Presidents then considered a revival of the past practice of visiting each other's state conferences. During difficult budget times, these visits had dwindled down to very few each year. President Basford indicated that he thought the visits were beneficial to the association and to the individual states, promoting partnerships for SASFAA's long history of providing exceptional training to the membership. The state Presidents agreed that the time was right for a renewal and worked together to formulate budgetary and logistic strategies to make the visits possible. It was decided to ask the SASFAA finance committee to include an amount in the association budget to assist with the expense. In addition to SASFAA's financial support, each state would provide complimentary registration, hotel, and meal to the visiting president, or designee. The state association of the traveling president would cover any remaining expense for the visit. It was also determined that the visiting president would present two sessions while attending the conference. One presentation would be centered on professional association involvement; the other would be one that was mutually agreed upon by the president and the needs of the conference agenda. The presidents worked together to construct the presentation template, and a survey to be used after each presentation as an assessment tool.

In late fall, after the first successful visit, President Basford asked the Presidents to determine the program's merits and if it might qualify for the NASFAA Gold Star Award. After review of the award requirements and application cycle, the presidents decided that in order to submit a competitive application, we would need more time and more data.

At the June meeting, the Presidents devised a plan for collecting and reporting the necessary data. Because their tenure on the SASFAA board has ended, the 2015-16 work of the group will continue under the guidance of President Basford. The following timeline will be applied:

- July – September – Presidents distribute and collect surveys, then submit results to the group via email.
- October - Sarah Dowd will compile the data and report to the Presidents.
- November - If the data supports the award, she will write the first draft of the application.
- December –January – Editing and rewrites completed through email and phone calls.
- February – Submit NASFAA Gold Star Award application.

The Presidents agreed that in order for the award application to be viable, the exchange and presentations should continue, and data should be collected each year. The 2015-16 Presidents have agreed to consideration of continuing both.

Sarah, thank you for the history knowledge dedication, and commitment to SASFAA this year.-President Basford

Resource Partner Liaison

Lenny Akins (Inceptia, Smyrna, GA) Lenny Akins chaired this committee. The role of this committee was to obtain information from our resource partners regarding concerns, issues, and accomplishments for dissemination to the Executive Board and membership. To inform the resource partners of policy changes and actions taken by the board; to use the SASFAA listserv to inform members of legislative and regulatory activities that relate to our resource partners, and to send reports to appropriate SASFAA committees for publication to membership.

- Lenny worked with each resource partner to ensure that their voice was heard at board meetings, and provided valuable information in reference to our resource partners ideas on training opportunities they offer, and ideas how to work together to provide that information to our members.

I do feel that we need to ensure that our resource partners continue to have a voice at the table. I appreciate the service and dedication by Lenny this year. –President Basford

Closing comments:

It has truly been an honor to serve as President this year. As you may know the theme for the year was: “Uncovering our Purpose, Power & Passion.” I believe that each member of the 2014-15 board did just that. During each meeting whether in person or via conference call we kept the theme in mind as we discussed the operational budget, future conference site locations, training opportunities and other items that came before the board.

The entire board read an excellent book this year; “Road to Relevance” by Harrison Coerver & Mary Byers. This book provided strategies for associations to consider when beginning reviewing their long range planning. Operating as we have traditionally for the last few years is not a viable option, we must be disciplined strategist. We have used the strategies from the book as well as from comments from all board members to lead our association to an ever-more valued, sustainable and relevant future.

I want to thank my school, Florida State University for allowing me this opportunity, to all my co-workers for their support, and most important to you the members of SASFAA. Thank you for allowing me this honor and opportunity. My sincere thanks to the 2014-15 board members for their support and dedication. We made a difference!

As I reflect on the year, I feel that it has been a very successful year! We have provided many training opportunities to our members, we have ensured that SASFAA remains fiscally sound, and we have advocated for students in Washington D.C.

Nathan Basford, Jr.
June 30, 2015