

**SASFAA Annual Report**  
**2008-2009**  
**Southern Association of Student Financial**  
**Aid**  
**Administrators, Inc.**  
**July 2009**



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**SASFAA President, 2008-2009**  
**In Compliance with SASFAA Bylaws, Article VII, Section 1**

## SASF AA Annual Report 2008-2009

This annual report is a review of the activities of the officers, state presidents, committees and liaisons for 2008-2009 and serves as the President's report to the SASFAA membership. This report summarizes the goals established by each of the officers, committee chairs, and liaisons, and will focus on highlights of their accomplishments. All of the Executive Board, committee chairs and liaisons should be commended for an incredible job for SASFAA during an economically challenged and stressful year.

### **President**

The 2008-2009 SASFAA Board, committee chairs and liaisons met to transition on June 7, 2008, and together we discussed SASFAA's strengths, weaknesses and opportunities and threats for the 2008-2009 year. I was proud to select five returning chairs, two prior-year committee chairs in new capacities, and seven new committee chairs to the Board. All nine states were represented, and various school and educational agency sectors were represented as well. At that transition meeting, I outlined several goals for the year:

- That we understand our purpose and focus is that of students and their educational opportunities. I invited a student to each Board meeting, and that student spoke and explained how financial aid had made a difference to him or her. Each student was presented with a scholarship from the contingency fund. I also asked the Conference Committee to provide student and aid recipient speakers in Myrtle Beach at our Annual Conference, and come up with a theme that celebrates why we do what we do. On Deck with SASFAA: Building a Field of Dreams was born!
- That we study the recommendations from the previous year's Revenue Review Task Force, and make necessary changes and financial considerations for this year's Board. During the year, with assistance from Past President Brent Tener, I did survey current and previous Board (past two years) members to evaluate length of term of office, location of meetings, whether or not all members should be in attendance at meetings, the type of meetings to hold, etc. Strategic decisions were made to hold a meeting at a Days Inn, to offer pizza for Board dinners, and to eliminate President/President-Elect Travel to cut down on costs.
- That we offer an interregional visit program for our presidents-elect and a scholarship program for schools and members that have never attended an Annual Conference. Both of these projects were subsequently cut due to funding. Thanks to Joanie Walker for taking the lead of these tasks as a Special Appointee prior to budget decisions.
- That each board member become familiar with the SASFAA Policy and Procedure Manual, the governance and planning document, the long-range plan and the implications they have in setting their goals and objectives for the year. Each Board member was asked to review the documents and provide suggestions. It was also a goal of mine to add Diversity in as an official discretionary committee in the manual, and to provide bullet points for its role and purpose. These changes were adopted at our last meeting.

- That we offer a comprehensive membership survey on-line to assess membership structure, fee increases, satisfaction of Association services, and suggestions for remaining financially sound. More on that survey can be found later under Membership.
- That we recognize and understand the importance of committees comprised of a diverse membership: ethnicity, gender, sector, institution type, state representation, and years/types of service. SASFAA is all about our membership and volunteers, and I wanted all voices to be heard. We actively recruited 91+ volunteers and made every attempt to use all volunteers. I asked the chairs to coordinate and only put members on one committee so more people could have a chance to serve. Thanks to the many SASFAA members that gave of their time to make this year incredibly successful.

In addition to these goals, SASFAA maintains its purpose and pledge to offer personal and professional development opportunities. Five specific “training” goals for the year included the following:

- A Leadership Symposium was offered in December offered to 27 participants. 3 members from each of our nine states attended the event at the Grove Park Inn.
- Our Management Institute focused on Access and Affordability, featuring well-renowned speakers, was also offered at the Grove Park Inn in December. 53 SASFAA members attended the event.
- Our Annual Conference held in Myrtle Beach in February 2009 was a success with 412 people attending. North Carolina was honored at this meeting for its NASFAA state award.
- A successful pre-conference workshop entitled **Financial Planning and Debt Management for Financial Aid Administrators: Helping Your Students Meet Their Financial Goals**, offered by EASFAA President Dino Koff.
- Our premier New Aid Officer Workshop was held at Clemson University in June 2009, with 69 participants attending.

Although I provided my ideas and suggestions regarding these goals, the Board, committee chairs, and liaisons worked with these ideas and allowed us to have a great year. Their many activities and accomplishments are summarized in the next several pages.

My first official capacity as your President was to represent you at the NASFAA conference. It was indeed an honor to welcome all of the NASFAA members to our region, and to provide the Southern welcome. Congratulations again to FASFAA for their incredible job managing local arrangements in Orlando at the Disney Dolphin and Swan. SASFAA received its first regional award at this conference, and NCASFAA was honored with a NASFAA state award.

To serve as your President this year was a tremendous honor and privilege. The confidence and support you showed me this year has been overwhelming – my goal was to represent you to the best of my ability. After each Board meeting, I sent a recap of the meeting’s events and action items. Many members commented that they enjoyed the transparency and honest communication about what was done throughout the year. I was able to experience some Southern hospitality this year at various state conferences. The decision was made to stop my travel in the spring to conserve resources, but I either sent a representative or provided a

YouTube video for each state. Hopefully you enjoyed the SASFAA Updates this year, as I attempted to not only provide Association news and business, but to motivate members and to encourage them to enjoy, celebrate and remain in our noble profession.

A big responsibility of the SASFAA President is to represent the Southern region on the NASFAA Board. The year had its many twists and turns, and much of NASFAA's efforts focused on the National Conversation Initiative. (NCI) SASFAA sponsored two NCI sessions in the winter months, and these sessions allowed financial aid professionals to speak up about issues affecting them. The SASFAA Board was successful in sharing its opinions on critical financial aid issues, and that guidance and support allowed me to vote the way I believed my constituents would ask of me on several NASFAA Board items.

If you have questions about any of the activities conducted by SASFAA please do not hesitate to contact any member of the 2008-09 SASFAA Board of Directors, but you may reach me at 502.452.8404 or at [hboutell@bellarmine.edu](mailto:hboutell@bellarmine.edu). I will never forget my experiences and thank you for the trust you placed in me to lead this rich, cultural region full of diverse, wonderful professionals who care and make a difference for America.

### **Immediate Past President**

Lisanne Masterson (North Carolina, 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. After Board discussion and approval, a full slate was provided for each office. Information was provided on the SASFAA listserv informing the membership about the upcoming elections, and in the SASFAA newsletter with online voting details, and the photos, bios and candidacy statements. Online voting commenced 10 days prior to the annual conference. Sandy Neel from University of Tennessee-Martin was elected to the position of President-Elect, Kim Jenerette from University of South Carolina-Upstate was elected to the position of Vice President, and Jeff Dennis from Southern Wesleyan University was elected to a two-year position as Treasurer.

The following awards were presented at the annual conference:

- SASFAA Distinguished Service Awards were presented to Bill Cox and Karen Koonce. Past SASFAA President Koonce is a long-time contributing member of SASFAA and VASFAA, and Past SASFAA President Cox is a long-time contributing member of SASFAA and NCASFAA.
- After long-time service to the financial aid profession and SASFAA, Honorary Lifetime Membership was presented to Clark Aldridge and Jane McNaughton, who both retired during the year.
- Betty Whalen was presented the NASFAA State and Regional Leadership Award by NASFAA National Chair Dave Gruen at the SASFAA Conference in February 2009.

- The Executive Board submitted the nomination of Janet Sain to NASFAA for the NASFAA State and Regional Leadership Award, and she was recognized at the NASFAA conference in San Antonio, TX, in July. The award will be presented “officially” to Janet by National Chair Barry Simmons at the SASFAA Annual Conference in Louisville, KY, in February 2010.

The GAP committee met in April to compile the annual report that was presented to the SASFAA Board in June. The GAP report is available for review on the SASFAA website.

Lisanne was a wonderful resource to me as your President throughout the year. Her patience and guidance was very helpful, and I thank her for her many years of service to SASFAA.

### **Vice President**

Erik Melis (Virginia, 4-Year Public), Vice President, was elected to the position of Vice President, but unexpectedly resigned due to personal issues in late September. Sharon Oliver (North Carolina, 4-Year Public) was appointed by the President and approved by the Board to take over Erik’s role. Sharon, as Vice President is responsible for the professional advancement activities of the Association. With the exception of the one-day New Aid Officer Training that was held on the Sunday prior to the annual conference, much of her work and the work of the Professional Development Committee occurred in June. The one-day New Aid Officer Workshop held in February was a success with 20 members participating. The week long New Aid Officer Workshop was held from June 14 - 19 on the campus of Clemson University in Clemson, SC, with 69 participants. Jill Rayner from North Georgia College & State University served as the curriculum coordinator for the workshop. Six SASFAA members were selected as faculty and represented a cross-section of the membership and institution types. Assistance during the week was provided by the lending community and a U.S. Department of Education training officer.

Special thanks to Sharon for her willingness to step up and take over the Vice President position. The Vice President performs the duties of the President in her absence, so the decision to take on the job was not taken lightly.

### **President-Elect**

Keith Reeves (South Carolina, 4-Year Public) served as the SASFAA President-Elect. His responsibilities during the year included:

- Served as an alternate voting representative to the NASFAA Board of Directors and provided written reports of NASFAA activities to the SASFAA Board and to the membership.
- Represented SASFAA at state meetings in the absence of the President.
- Conducted an orientation session for the state presidents-elect prior to the February SASFAA conference.
- Made preparations for the 2009-2010 year.

In preparation for 2009-2010, he became more familiar with the SASFAA Policy and Procedures

Manual, promoted the 2010 SASFAA conference at this year's conference in Myrtle Beach, promoted volunteerism and updated the SASFAA volunteer form, selected committee chairs, and assisted committee chairs in selecting members to serve on their committees. The contract for the Fall meeting of the SASFAA Board was finalized.

Keith has selected an excellent, experienced Board for 2009-2010, and will lead us in the next year appropriately and effectively.

## **Secretary**

Brad Barnett (Virginia, 4-Year Public) completed the first year of his two-year term as SASFAA Secretary. His responsibilities and accomplishments for the year included:

- Created SASFAA stationary for 2008-2009.
- Reviewed the Policy and Procedures Manual for corrections and made extensive revisions throughout the year. These revisions made the Manual more manageable based on placement of appendices and stand-alone documents.
- Worked extensively on the maintenance of records to know how to access old documents and how to move forward with new ones in proper format.
- Mailed sympathy and congratulations cards to SASFAA members and others as needed.
- Prepared all Board minutes and posted these to the SASFAA web site.

Brad is to be commended for changing our report format at meetings from a paper free-for-all, to a concise, compiled document that Board members could view on laptops or print out if desired. Board members complied with Brad's requests and are to be congratulated on meeting deadlines and improving our reporting process. Brad kept our records current, and made massive changes to the SASFAA Policy and Procedures Handbook during the year.

## **Treasurer**

Terri Parchment (Tennessee, Lender) concluded her two-year term as SASFAA Treasurer. Her responsibilities and accomplishments included:

- E-mailed at least quarterly the budget line itemized expense report for each Board member and committee chair.
- Assisted in the updating of the Policies and Procedures manual.
- Ensured that PayPal can continue to be used to pay membership fees, conference fees, professional development fees and vendor/sponsor payments.
- Worked with CPA firm to review our procedures for the 990. Successfully filed the 990 and 990-T for the past fiscal year.
- Utilized QuickBooks on the Web to allow the Budget Chair and President to have anytime access to budget information or fund information.
- Chaired a Vendor/Sponsor Refund Ad-hoc Committee that ultimately created a new policy in our manual related to such refunds.
- Paid all bills in a timely manner and reimbursed members via the Web.

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. Terri performed her duties accurately and timely.

### **State Presidents**

The state presidents had essentially two goals as they served on the SASFAA Board. These goals included:

- 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.

This group of state presidents served the Association during a time of economic instability and uncertainty, and they represented their respective states well. They always kept the best interests of SASFAA in the forefront. Their comments and suggestions helped SASFAA have a very positive year!

The success they experienced in their own states is to be commended, as the majority of the states ended up in the black in a tough budgetary year. Their involvement allowed the Board to meet with Jo Ann Borel, supervisor of all of the Title IV federal trainers, to talk about federal training in our region, and to hopefully improve training activities and conference attendance from the federal trainers in the future. Many of the states also took stands legislatively, unifying their members and encouraging them to respond on the PLUS Loan Auction and proposed elimination of FFELP. This group also was quick to note the importance of this regional association, as various proposals about merging regions and eliminating regional conferences emerged.

Through it all, these state presidents did their work with joy, caution, encouragement, conviction, and a sense of connectedness to each other. It was a pleasure to work with them all.

### **Conference Committee**

The 46th SASFAA conference, "On Deck with SASFAA: Building a Field of Dreams", was held at the Sheraton Myrtle Beach Convention Center Hotel in Myrtle Beach, SC, February 8-11. Sandy Neel (Tennessee, 4-Year Public) served as chair of the committee. Her committee originally included individuals from all nine of the SASFAA states and representatives from all sectors of the Association. Some of these members were unable to attend due to budget constraints and other issues. The conference committee was also supported by a host of South Carolina Association of Student Financial Aid Administrators (SCASFAA) members that hosted the Hospitality Suite and provided general assistance. The Conference Committee also checked the list of SASFAA volunteers, and utilized volunteers that were not placed on an official committee.

The committee was tasked with several goals including:

- Determine the training/professional development needs of members, recognizing categorical distinctions among members such as experience, institutional type, and level of responsibility.
- Improve and enhance the annual conference using the reviews and evaluation of previous conferences, as well as current needs of members.
- Present programs and sessions possessing both vitality and relevance for all members.
- Provide a diversity of topics recognizing both the need for regulatory and technical knowledge, as well as the need for skills in management and human relations.
- Recognize and encourage the development of informal "networking" strategies for sharing information and locating job opportunities.
  - Offer advanced training programs and seminars for experienced members on unique topics related to financial aid administration after considering whether such activities are geographically accessible, financially feasible, and educationally enhancing.
- Select a committee make-up that represented all sectors, ethnic groups, etc., to provide active participation and new leadership opportunities for members.

The following is a brief summary of the 2009 Conference:

The conference's opening day on Sunday included three pre-conference events. A New Aid Officer's one-day Workshop was led by Sharon Oliver and taught by several of the instructors who also taught again during the New Aid Officer's Workshop in the summer, a State Presidents' Workshop was led by President-Elect Keith Reeves, and a Financial Planning Pre-Conference Workshop was led by EASFAA President Dino Koff.

The opening session included our baseball line-up, a first pitch from the Myrtle Beach Pelicans mascot, an update from NASFAA President Phil Day, and a few financial aid success stories from students and financial aid administrators. The President's Reception was a "Night on the SASFAA Boardwalk", with boardwalk games, food and lots of activities. Thanks to many of our vendors and sponsors for their help with this event. Highlights on Monday included our luncheon with more success stories and a Washington Update from Ron Gambill, Edsouth, and Brett Lief, NCHELP. On Tuesday, Jeff Baker from the Department of Education provided the Federal Update, and the Committee organized our banquet and awards night, congratulating NCASFAA on its state award and hearing from a few more success stories. Wednesday concluded our meeting with a NASFAA Update from Dave Gruen, NASFAA Chair.

In addition to the tremendous general session offerings, over 50 concurrent interest sessions were held on a variety of topics categorized as New Aid, Department of Education, Financial Aid Practices, Technology, Industry Issues/Trends, Graduate School Issues and Personal/Professional Development. This year's community service project was the Recording for the Blind and Dyslexic. (RFB&D). Thanks to the generosity of our members, we were able to present them with a check for over \$3,000! This money will go to purchase four college textbooks for students with disabilities in order to help them succeed.

In addition to the awards already mentioned in this report, Lisanne Masterson, Immediate Past President, Sharon Oliver, Vice President and Terri Parchment, Treasurer, were recognized for their service to SASFAA.

A total of 412 individuals attended the conference. While our number of attendees was significantly down, attendees commented on the “feel” of the conference, and really enjoyed the networking time. Those in attendance were encouraged to complete an on-line evaluation. Overall, the evaluations were excellent, and will be reviewed by the 2009-10 conference committee in order to make changes they deem appropriate.

### **Diversity Committee**

The Diversity Committee was chaired by Dee Talley (Alabama, Four-Year Public). The committee’s work included the following tasks:

- Submitted three newsletter articles for inclusion in our publication.
- The Chair served on the 2009 SASFAA Conference Committee, and the Committee developed five interest sessions on diverse topics for presentation at the annual SASFAA Conference.
- Proposed recommended text for policies and procedures of the Diversity Committee that was adopted in June.
- Conducted a leadership panel discussion for participants at the SASFAA Leadership Symposium.
- Each month highlighted one of the nine SASFAA states on the SASFAA listserv.
- Diversity Committee discussed renaming the committee and solicited suggestions from the SASFAA membership.

The Committee is to be commended for their work in providing information to help all SASFAA members achieve diversity. The collaboration between various committee chairs to bring diversity to the forefront was appreciated and necessary.

### **Electronic Services Committee**

Joe Dobrota (Virginia, Four-Year Private) served as chair for the Electronic Services Committee. The goal of his committee was to support SASFAA’s mission by providing a mechanism for disseminating information to the membership through the SASFAA website and the SASFAA listserv. Significant activities and accomplishments by Electronic Services included but are not limited to:

- Updated the homepage, at request of President, to remove person specific introduction and make it more of a welcome from the Association.
- Updated areas of Web site requiring annual update (state pages, committee chairs, board members, etc.).
- Worked to keep the Site Map page consistent with data/dates on other pages.
- Successfully navigated/implemented webpage information for Leadership Symposium, Conference, and New Aid Officer’s Workshop.

- Researched possibility of direct update of Web page information with ATAC. ATAC is unwilling/unable to allow this type of update for security/formatting concerns.
- Developed a Web site of photos from the annual conference and distributed to the membership.
- Posted routine updates of the SASFAA budget to the Web site.
- Researched possible alternative to conference information/registration hosting. Determined ATAC offerings were less expensive and met needs.
- Assisted in a limited capacity with technology setup/operation at annual conference.

Joe was serving in his first year on the SASFAA Board, and is to be commended for his work in learning the ATAC system. His willingness to work with all members of the Board was a delight.

### **Budget and Finance Committee**

It fell to the chair of the Budget and Finance Committee, Chris Tolson (Kentucky, Four-Year Private), and her committee to oversee that the Association remain financially sound in order to accomplish our mission to establish a community of members who share ideas and professional competencies and experiences, serve the diverse needs of students, parents and institutions. 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 2008-2009 and managed the Association's reserve funds. These reserve funds have been established to protect the Association in the event that the Association is unable to meet its contractual obligations. These funds are invested in long-term CDs and securities and have varying maturity dates. The Association is advised by James A. Mills, Senior Investment Officer, SunTrust Securities Corporation. As these funds mature the chair of the Finance and Audit Committee works to ensure that the best rates are found for reinvestment.

Activities conducted by the Budget and Finance Committee included:

- Developed a template to solicit budget requests from the executive board and committee chair.
- Completed an annual review of the financial records, which detailed the positive work of our Treasurer.
- Researched and updated the Endowment Fund to include document in the Association's governing documents.
- Maintained the SASFAA Contract Committee spreadsheet to review ongoing liability and to monitor hotel deposit amounts and due dates.

This year was indeed difficult with attendance down at all events, and revenue below what we expected. SASFAA finished the year approximately \$20,000 in the red, due to the nature of our hotel obligation in Myrtle Beach and low attendance. Chris is to be commended for her assistance in managing our checking and savings accounts to keep positive cash flow, and for moving funds from CD's to money market accounts for necessary liquidity.

### **Legislative Relations Committee**

Bill Spiers (Florida, 2-Year Public) was the chair of the Legislative Relations Committee. This committee was charged with reviewing proposed federal legislation affecting the administration of financial aid, keeping the SASFAA membership updated on pending legislation and to make recommendations to the Board as to possible positions that the Board might take related to this legislation. Accomplishments this year included:

- Committee phone calls held almost bi-monthly.
- Three educational documents provided to the membership.
- SASFAA members testified at federal hearings
- Three notices provided to membership on important dates.
- All states represented on the committee.
- Participated as a resource to the NASFAA committee.
- Included a NASFAA committee member on our committee.
- Letter to congress on FFELP, approved by the Board and sent with the help of President Boutell.

The year came with much legislative activity, and Bill is to be commended for his work to educate our members about important issues.

### **Membership Committee**

Laura Diven-Brown (Mississippi, 4-Year Public) served this year as a second-time chair of the Membership Committee. She worked with the state presidents to encourage financial aid professionals to join SASFAA. The result of this work was a year-end SASFAA membership of 1,216.

Following is a summary of major activities conducted for the 2008-2009 year:

- Efforts were made to clean up data regarding “not specified” institution types. The only members remaining with a “not specified” type are those who explicitly stated that they were not affiliated with an institution, or those who did not list one.
- The Membership Committee again promoted a friendly competition to see which state association could exceed its SASFAA membership numbers from the year before. Tennessee is to be commended on reaching membership goals.
- The Membership Chair provided input on the membership form. Changes were made this year to allow the Membership Form to capture each member's first year in SASFAA in membership (award) year format (e.g. 2005-06 versus 2006).
- The President asked the Membership Committee to prepare an online Member Survey. This survey was emailed to all individuals in the SASFAA database who were members during either 2008-09 or 2007-08. Data was collected beginning December 16, 2008, through January 15, 2009. Questions were asked about membership structure and categories in addition to opinions of possible fee increases, satisfaction with association services, and suggestions for staying financially sound. 422 responses were received. Survey respondents did not recommend changes to the membership categories or the membership structure. The membership also did not want fees to be raised to any

significant degree during this period of organizational budget constraints. There was an affirmation of the value of benefits like the listserv and newsletter - inexpensive ways to stay connected to the profession.

- The Chair and the Treasurer worked together in preparation for conference registration. The conference registration form was reviewed. In addition, this year, the Membership Committee collaborated with Local Arrangements to secure volunteers to help at the registration area. Five Membership Committee members volunteered to take shifts as well, which increased their volunteer role this year.

Thanks to Laura for her work, specifically with the membership survey. This survey was important for future planning and to get the response we needed from our membership.

### **Newsletter Committee**

The objective of the Newsletter Committee and the Newsletter Editor, Deborah Clark (Georgia, Technical School), was to disseminate information of interest to the financial aid community and to publish an online newsletter four times a year. The work of this committee involved the assistance of the state newsletter chairs to obtain information for publication from the state. In addition, articles were submitted by the Executive Board members, committee chairs and liaisons. SASFAA members were also encouraged to provide articles for publication. The editor worked closely with the Lester McKenzie, chair of the Sponsorship Committee, to ensure advertisements were received timely for placement in the newsletter. The following is a summary of activities for the year:

- The newsletter schedule and guidelines were established and disseminated via email and the SASFAA website.
- In addition to the Message from the President, Board member reports, Committee Reports, articles of interest from the membership, and Movers and Shakers, each edition included a Student Success Story, as the result of one of the initiatives for 2008-2009.
- “Newsletter Ticklers”-- An article from each newsletter was referenced in a communication sent to the membership as each issue was published to encourage and maintain interest in the newsletter.
- State newsletter articles that may be of interest to the region were solicited (and received) from state representatives.
- The Newsletter Chair, with the President’s approval, wrote an article recognizing NCASFAA for their NASFAA State Award.
- The Newsletter Committee implemented a new feature to “Spotlight” the State Presidents. Three presidents were included in the fall edition, two in the winter edition and four were included in the spring edition. Each state representative was asked to “interview” their respective state president, which allowed the SASFAA membership to get to know the state presidents.

Thanks to Deborah for her creativity and hard work on the newsletter this year.

### **Site Selection Committee**

The purpose of the Site Selection Committee was to identify sites that will provide a suitable physical environment for conferences, committee meetings, Executive Board meetings and professional development workshops. Janet Sain (North Carolina, Lender) chaired this committee.

Major accomplishments of the Site Selection committee included:

- Completed contract negotiations for SASFAA 2011 in Jacksonville, FL at the Hyatt.
- Completed contract renegotiations for Transitional Board meeting at The Don in St. Pete Beach, FL for lower room rates and lower room block while keeping concessions the same.
- Completed contract renegotiations for SASFAA 2010 at the Marriott with lower room block while keeping concessions the same.
- Completed contract amendment of the overflow hotel for SASFAA 2010 at the Hyatt.
- Completed contract negotiations for the NAOW to be held at Clemson University.
- Completed contract negotiations for the August Board meeting and August Conference Committee meeting at the Louisville Hyatt.
- Completed contract negotiations for the Fall Executive Board meeting in MS at the Hilton Garden Inn.
- Completed site visits for possible future NAOW in NC and SC.
- Successfully delayed completing contracts for SASFAA 2012 and 2013 in AL and MS due to the uncertain nature of our industry.

Janet had her work cut-out for her this year, as contracts were negotiated and re-negotiated. Thanks to her expertise, SASFAA managed to save thousands of dollars with several hotels.

### **Sponsorship Committee**

Lester McKenzie (Tennessee, 4-Year Public) chaired the Sponsorship Committee for 2008-2009. The year was a bit tumultuous with many of our sponsors exiting the business or choosing to merge. Listed below are the Committee's accomplishments:

- The Chair served as a member of the budget committee, and assisted with the Annual Review of the Association's records/books.
- The Chair served as an ex-officio member of the conference committee.
- The Chair spoke to members of the current Board, lender staff and other regional and state association vendor/sponsor chairs to assess the current state of involvement by vendors/sponsors on normal Association activities and future endeavors.
- With the assistance of current SASFAA Treasurer, Chair completed a same time comparison of vendor support for the past three years. The in-kind support that the Association has benefited from in the past has been severely reduced and opportunities for increased advertising revenue have been developed and approved at a Board meeting.
- Chair presented a restructured vendor/sponsor (exhibitor) policy which included a new pricing structure for conference exhibiting, program advertising, workshop sponsorship and advertising and web banner advertising.

- Created and published new sponsorship policy and distributed via email to all non-institutional members.
- Contacted and received a contract from the two hotel-recommended drayage companies and presented that information to President Boutell, Sandra Neel, Conference Chair and Janet Sain, Hotel Liaison. It was determined that one company was considerably more desirable and that contract was given to Ms. Boutell for her signature.
- Chair created a second email distribution list of all primary contacts for exhibitors. Emailed correspondence from conference chair, electronic services chair and other board members to promote and inform them of annual conference activities.
- Chair publicly thanked each exhibitor at a luncheon session at the annual conference.
- Chair created a distribution list for all exhibitors and provided drayage and conference information.
- Chair disseminated an online/electronic spreadsheet of all conference attendees to all exhibitors.
- Chair created a marketing tool to send to exhibitors/sponsors of past three annual conferences who had not completed a sponsorship form. Net outcome of correspondence resulted in four additional sponsorships.

Thanks to Lester for his work on sponsorship. His efforts allowed SASFAA to come much closer to meeting sponsorship revenue goals in a very tough year.

### **Special Appointee – Leadership Symposium**

One of my goals for the year was to offer a Leadership Symposium for 27 individuals from the nine states, similar to the symposium offered two years ago under Past President Brent Tener's leadership. Sharon Oliver (North Carolina, 4-Year Public) was appointed to oversee this workshop, and then of course assumed the position of Vice President and successfully accomplished this goal. The purpose of the event was to help prepare selected aid administrators from the SASFAA region to continue or assume leadership positions in the profession. The theme was "Leading in Challenging Times-Becoming the Person Others Want to Follow". Participants were selected with the assistance of the nine state presidents and the members of the Executive Board. Sharon and her committee performed the following tasks:

- Each participant was notified in advance of assignments and deadlines. The task assigned or listed below:
  - \*Professional Autobiography of 600 words
  - \*Read "21 Indispensable Qualities of a Leader"
  - \*Movie - 12 Angry Men
  - \*Group Report/Presentation/Skit
  - \*Journal/Letter
- Sessions were taught by organizational development professionals from various industry vendors including ECMC, College Foundation, Edamerica and National Student Loan Program as well as by SASFAA institutional members.
- The last day of the symposium included with Group Reports/Presentations/Skits that acted as a report on each group's assigned chapters in *21 Indispensable Qualities of a Leader*, concepts gleaned from the various sessions and leadership lessons contained in the movie. Groups were encouraged to be as creative as possible in the format of the

report...to identify and illustrate three to six positive 'ah-ha' leadership moments experienced by symposium participants. Each report was limited to five minutes. Participants were encouraged to maintain a journal of their 'ah-ha' moments. The group projects were amazing given the short period of time for the creativity and leadership skills displayed by every group. The group projects were recorded.

- The success of this workshop can be evaluated based on the number of participants who will be actively serving in leadership roles in their state associations for 2009-10, which is over 50%. All participants completed an evaluation form which resulted in a response rate of 100%.

Feedback from the participants included words like "life-changing", "the best thing SASFAA does", and a "wonderful opportunity for growth". Thanks to Sharon and her committee for providing an awesome leadership development opportunity.

### **Special Appointee – Management Institute**

Brenda Brown (University of Miami Law School, Grad/Professional) was charged with conducting a Management Institute specifically designed for financial aid professionals in leadership roles. The Institute had not occurred in four years, so last year's Board approved Brenda's appointment. The event theme was "Access and Affordability", which a wide variety of speakers include nationally known professionals such as Dr. Donald Heller, Dr. Sandy Baum and Dr. Phil Day. The event was held at the Grove Park Inn at the same time as the Leadership Symposium to conserve costs and to allow the two groups to meet and mingle. The committee accomplished the following goals:

- The committee's selection of speakers that are considered experts in higher education was well received by the attendees.
- The overall evaluation rating of the event was 4.56 out of 5.
- We were able to meet our contract obligations, despite the fact that we had a total of 53 attendees which included the 6 presenters and my committee members.
- Chair will submit a "Draft" of the MI Planning manual (similar to Summer Workshop Manual) for consideration to be added to the Appendices of the P & P.

Thanks to Brenda for her work on this event. SASFAA members appreciate opportunities for those at higher management levels, and this workshop

### **Special Appointee – All Roads Lead to SASFAA**

Joanie Walker (Tennessee, Agency) was selected to create a new program entitled "All Roads Lead to SASFAA". The idea came about after I attended WASFAA, and noted that their region provided scholarships for school attendees that had never attended a regional conference. The idea was to involve some new schools and encourage attendance at SASFAA. This idea was well-received by the Board, but cuts to the budget had to be made, and this item was cut.

Joanie also was going to assist in a Presidents-Elect visitation program among the states for these leaders to gain new insights and ideas for their years as state presidents. This project was also cut due to funding.

Thanks to Joanie for her patience throughout the year with these budgetary decisions, and for her help in assisting with some newsletter articles.

### **Agency & Lender Liaisons**

Tracy Ireland (Georgia, Agency) was the liaison to the various state agencies and Chuck Sanders (South Carolina, Lender) was the liaison to all of our lender partners for 2008-2009. Their responsibilities for the year include keeping the board updated regarding current issues within the profession that affect our lender and agency partners and updating the SASFAA members on regulatory/statutory issues and changes through newsletter articles and the listserv.

Both liaisons were resources for the Board throughout the year, and I appreciate their work and perspective brought to our meetings and discussions.

### **Summary**

As mentioned, this brief summary of the activities of your officers, state presidents, committee chairs and liaisons gives you some ideas of the many tasks and activities that were accomplished. This group of individuals worked exceptionally hard on your behalf this year and represented your Association well. There is no doubt in my mind that SASFAA is a strong regional Association, and that we come together because of our common interests and because we believe in our mission. I issued a challenge to all at the SASFAA 2008 Conference to “Step Up to the Plate”. Thanks to all of you that decided to play the game, made some hits, and allowed us to have a “grand slam” of a year.