

Southern Association
of Student Financial
Aid Administrators
October 2020



Agenda and
Board Reports

Prepared by Secretary Sarah Dowd

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AGENDA
SASFAA Board Meeting
October 24, 2020
Myrtle Beach Hilton – Center Ballroom
On-line - Zoom

I'll be there for you (When the rain starts to pour) I'll be there for you (Like I've been there before) I'll be there for you ('Cause you're there for me too) – The Rembrandts

Friday, October 23, 2020

6:30 PM Dinner – Callibakers – outdoor seating

Saturday, October 24, 2020

8:30 – 9:00 AM Breakfast –plated, please arrive at 8:30 East Ballroom

9:00 AM Call to Order Celena

Roll Call / Establish a Quorum

Action Item: ***Approval of Agenda with authority given to the President to make changes as needed in order to facilitate the flow of business.***

9:10 AM Welcome to South Carolina Traci

Approval of Prior Minutes Sarah

Action Item: Motion/Action Items
Approval of Committees Celena

Action Item: ***Vendor Directory*** Shannon

Action Item: ***Approval of Sponsorship Levels*** Michael

Action Item: ***Conference Fee*** LeighAnn/Theresa

Action Item: ***Budget & Finance Proposal – Bookkeeper*** Marian

Noon – 1:00 PM Lunch – plated East Ballroom

1:00 PM Round of Successes (2-3 minutes each)

2:30 PM New Business
 • Chief FAA Workshop/Director's Summit Celena

Old Business

TBA Dinner

Sunday, October 25, 2020

8:30 – 9:00 Breakfast –plated, please arrive at 8:30 East Ballroom

If the business meeting does not conclude on Saturday, it will resume on Sunday at 9:00 am



Southern Association of Student Financial Aid Administrators

Celena Tulloss/President

Executive Board Report/October 2020

Committee Members:

Past SASFAA Presidents will be utilized as an advisory group

Committee Goals for 2020-2021:

- Increase and diversify webinars for training and development, as well as to encourage membership
- Develop a mentorship guide, including all of the various ways mentoring is fostered in SASFAA
- Explore the potential for a SASFAA Diversity Leadership Program
- Strengthen Business Partner relations and opportunities for input
- To provide effective financial stewardship to ensure the sustainability of the organization
- To provide opportunities for leadership development for the growth and longevity of the association

LRP and GAP Goal Activity to date:

LRP 6.1: Ensure the Board of Directors understand the responsibilities and time commitment of their positions.

Activity: Board members were provided with duties and responsibilities in the Policies and Procedures for committee chairperson(s) to review in July 2020.

LRP 7.1: All efforts should be made to fully vet members who are considered for committees.

Activity: Committee Chairpersons were provided instructions on the volunteer list to select committee members based on experience, ethnicity, state member representation, sector interests, and gender.

LRP 9.1: Develop a Mentorship Guide

Activity: A Taskforce was created to develop the mentorship guide.

LRP 8.2: Promote continuous membership through the New Aid Officer's Workshop.

Activity: A virtual New Aid event was held in conjunction with NASFAA

LRP 12.1 Develop content that promotes the objectives of the association.

LRP 13.1 Continue to use evaluation feedback, membership surveys and national trends to develop training topics and programs.

LRP 13.2 Periodically offer venues to upper level aid administrators to train, discuss and engage with peers and other high level administrators.

Activity: A meeting for the chief FAA's of various SASFAA institutions will be held, and led by Past President Zita Barree

LRP 14.1 Identify and encourage potential leaders who are prepared to take leadership roles and cultivate the use of their abilities

LRP 14.3 Create various avenues for leadership development.

Activity: A virtual Leadership Symposium will be held beginning November 2020, led by Rachelle Feldman of the University of North Carolina

LRP 17.1 Define levels of sponsorship that will meet our needs as an organization.

Activity: New sponsorship levels and amounts based on the Covid-19 pandemic were proposed for 2020-21

Motion/ Action Item(s):

None at this time

Policy & Procedure: Changes/ Recommendations:

None at this time

Activity Summary:

Budget & Finance Planning –

- Zoom meetings have been held with Budget and Finance, as well as the Treasurers, and Sponsorship to review budget amounts based on the virtual conference

Professional Development-

- Selected Rachelle Feldman to lead the Leadership Symposium. Staff include Sarah Baumhoff, Daniel Barkowitz, Sharon Oliver, Francisco Valines and Marian Dill
- Selected Zita Barree to lead the workshop for chief FAAs. Official title and staff TBA.

NASFAA –

- Attended NASFAA Board Meeting July 30, 2020 via Zoom
- Attended NASFAA Board Debrief October 21, 2020 via Zoom

State Conferences-

- Due to limited time in the schedule, no SASFAA update was given at the KASFAA fall conference, but upcoming events were announced and SASFAA will be represented in the spring
- Bill Spiers provided the SASFAA update at the SCASFAA conference
- Celena will provide the SASFAA update at the fall NCASFAA conference



Southern Association of Student Financial Aid Administrators

Tarik Boyd/President-Elect

Executive Board Report/October 2020

Committee Members

n/a

Committee Goals for 2020-2021:

- Review all SASFAA By-Laws, Policies and Procedures, and governing documents.
- Review the Long-Range Plan to ensure all issues are being or have been addressed.
- Represent the President as requested.
- Establish all committees and have chairs in place by February.
- Conduct the President Elect Workshop in conjunction with the annual conference in Montgomery. Invitations will be sent to the nine president-elect's and presenters by December 15, 2020.
- Participate in the Inter-Regional Exchange Program. Details are pending at this point. I will include details in my next Board report.
- Establish goals for 2021-2022 year by January 1, 2020
- Participate in the NASFAA Leadership Conference if able

LRP and GAP Goal Activity to date:

n/a

Motion/ Action Item(s):

n/a

Policy & Procedure: Changes/ Recommendations:

n/a

Activity Summary:

Current work involves developing workshops for Presidents-elect in February



Southern Association of Student Financial Aid Administrators

Joan Bailey/Vice President

Executive Board Report/October 2020

Committee Members

Felicia Ailster, GA
Bretta Carithers, GA
Lakisha Sanders, GA
Sharon Oliver, NC
Jonah Miller NC
Rachelle Feldman, NC
Jennifer Davis, SC
April Tretter, KY

Runan Evans, KY
Jenny Cun, FL
Brenda Brown, FL
Nadine Bailey, FL
Chad Sartini, VA
Stephanie Miller, AL
Karen Hauser, TN
Lashanda Chamberlin, MS

Committee Goals for 2020-2021:

1. Conduct a minimum of 6 webinars, Lakisha Saunders & Brenda Brown will coordinate the webinar series
2. Host the Leadership Symposium (in conjunction with fall board meeting) – seeking a coordinator.
3. Offer 2 pre-conference workshops: TBD
4. Offer at least one NASFAA Credentialing option during the annual conference - TBD
5. Hold the New Aid Officer Workshop with a goal of 90 attendees:
 - Runan Evans will be the Curriculum Coordinator
 - Currently 2020 staff and instructors confirmed to serve for 2021 NAOW.

LRP and GAP Goal Activity to date:

Committee members have been selected and training events have started. All training events to date and in the near future will be held virtually due to the continued pandemic.

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

The following events have been held:

- July 29, 2020 – Webinar titled “Managing Financial Aid amidst a Pandemic” – 86 registrants
- October 13, 2020 – webinar titled “Return to Title IV Essentials” – 83 registrants
- October 19-22, 2020 – virtual NAOW – 95 registrants

The Leadership Symposium will be chaired by Rachelle Feldman, due to the virtual format will be from November 6, 2020 to February 19, 2021. Instructors includes SASFAA past president and former State presidents. Registration will be limited to 30 participants.



Southern Association of Student Financial Aid Administrators

Sarah Dowd/Secretary

Executive Board Report/October 2020

Committee Members

Wayne Kruger

Lisanne Masterson

Nancy Tate

Committee Goals for 2019-2020:

By-Laws committee, chaired by secretary, annually reviews By-Laws governing the Association. The By-Laws committee recommends necessary changes to the Board.

- Review, recommend, and update P&P as needed in a timely manner.
- Review, recommend, and update By-Laws as approved by the Executive Board in a timely manner
- Submit reports for blog according to established schedule for the year

Motion/ Action Item(s):

None at this time.

Policy & Procedure: Changes/ Recommendations:

None at this time.

General Updates:

- Completed collection of Executive Board signatures for Confidentiality, Rules of Engagement, Conflict of Interest
- Reviewed membership status for committee members and provided follow up as needed
- Assisted President with review of board reports and agenda



Southern Association of Student Financial Aid Administrators

Leah Louallen/Treasurer

Executive Board Report/October 2020

Committee Members

Committee Goals for 2020-2021:

- Expense claims, travel claims and other reimbursements paid upon receipt
- All bills paid upon receipt
- Deposits posted bi-weekly
- Records and accounts maintained weekly in BB&T, QuickBooks and Wild Apricot
- Payments for registrations, membership dues and sponsorships will be posted and receipted weekly
- Financial reports submitted to each Board member
- Bank accounts reconciled monthly and emailed to the Budget and Finance Chair
- Credit card reconciled and outstanding balance paid monthly
- AffiniPay deposited two times each month and reconciled at the end of the month
- Develop procedures for each Treasurer's task

LRP and GAP Goal Activity to date:

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

- Close the 2019-2020 fiscal year.
- Create 2020-2021 budget.
- Schedule training with Treasurer Elect.



Southern Association of Student Financial Aid Administrators

Sarah Baumhoff/Treasurer-Elect

Executive Board Report/October 2020

Committee Members

N/A

Committee Goals for 2020-2021:

N/A

LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

Meeting with Treasurer, Leah Louallen, to begin training on treasurer duties.

Working on identifying a resource to digitally store all treasurer documents to make information easily accessible for Budget and Finance, as well as the Treasurer.



Southern Association of Student Financial Aid Administrators

Marian Dill/Budget and Finance Chair

Executive Board Report/October 2020

Committee Members

- Brad Barnett (VA), James Madison University
- Amy Berrier (NC), University of North Carolina – Greensboro
- Heather Boutell (TN), Vanderbilt University
- Sarah Baumhoff (GA), Kennesaw State University
- Heidi Hunter-Goldworthy (FL), Stetson University
- Wayne Kruger (FL), St. Petersburg College
- Lisanne Masterson (NC), Blue Ridge Community College

Committee Goals for 2020-2021:

- Hire a third-party bookkeeper & review/update job duty for treasurer, treasurer-elect, and B&F chair – Lisanne Masterson & Brad Barnett
- Review the airline travel policy (fees such as baggage, boarding early, etc.) - Amy Berrier
- Convert the expense reimbursement forms/policy to allow for digital signatures – Heidi Goldsworthy
- Develop online virtual storage for financial records – Sarah Baumhoff
- Develop means to reconcile event registrations to associated income line item – Wayne Kruger
- Review and provide recommendations for updating the requirements for the 1st quarter review for a new treasurer – Heather Boutell
- Oversee the internal financial review – Marian Dill

LRP and GAP Goal Activity to date:

Allocation of Assets

Operating Funds (15-25% target) – Bank Accounts -	\$109,828.13	Currently 12.35%
Short Term (30-45% target) – Advisory Solutions	\$439,069.59	Currently 49.2%
Long Term (30-45% target) – Charles Schwab	\$344,372.70	Currently 38.6%

Based on the existing market conditions and current limited cash flows needs, no funds will be transferred at this time.

The balance sheet is provided below.

SASFAA, Inc.

BALANCE SHEET As of June 30, 2021

	TOTAL
▼ ASSETS	
▼ Current Assets	
▼ Bank Accounts	
2 BB&T Checking-ACH Only	100.00
BB&T Checking	59,007.77
BB&T Savings	47,908.38
Edward Jones-Money Market	2,811.98
Total Bank Accounts	\$109,828.13
▼ Other Current Assets	
Advisory Solutions 20/80 @ Edward Jones	439,069.59
Charles Schwab (NASFAA)	344,372.70
Total Other Current Assets	\$783,442.29
Total Current Assets	\$893,270.42
TOTAL ASSETS	\$893,270.42
▼ LIABILITIES AND EQUITY	
Liabilities	
Total Liabilities	
▼ Equity	
Opening Balance Equity	758,080.87
Retained Earnings	131,729.10
Net Income	3,460.45
Total Equity	\$893,270.42
TOTAL LIABILITIES AND EQUITY	\$893,270.42

Accrual basis Tuesday, October 20, 2020 01:37 PM GMT-04:00

Motion/ Action Item(s):

Budget & Finance Committee Recommendation

History

The B&F Committee has been reviewing the current structure of the Treasurer and Treasurer-elect positions for the last two years. After consulting with the current Treasurer as well as some past Treasurers, we decided to take the next step to ascertain the feasibility of eliminating the Treasurer-elect position and securing the services of a paid bookkeeper.

Process and Findings

We have struggled to clearly define separate responsibilities for the Treasurer and Treasurer-elect and the implementation of some of them proved difficult, due in part to their geographic location.

We then moved forward with research on a paid bookkeeper. We discovered several states and/or regions within NASFAA that have a bookkeeper, with the closest being FASFAA (Florida). The pros and cons were discussed as follows:

PROS	CONS
<ul style="list-style-type: none"> Treasurer can become overwhelmed at certain times of year May be increasingly more difficult to get members to run for the office of Treasurer 	<ul style="list-style-type: none"> How this would impact the budget Would need to make Bylaws and P&P changes Still have to separate responsibilities

<ul style="list-style-type: none"> • Consistency in having a set address (for banking purposes) 	
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In reviewing the ‘Cons’, our biggest concern is the impact on the budget. We did not feel it prudent to utilize reserves for this position. However, by eliminating an elected officer, those expenses would be able to be used to help offset the cost of a paid bookkeeper, as well as the potential for finding the difference in other line items. Florida pays their bookkeeper \$500/month (\$6,000/year). We canvassed a couple of past SASFAA treasurers who felt that was reasonable (or could go a little lower).

Recommendations

1. The SASFAA Budget & Finance Committee recommends that the Treasurer-elect position be eliminated and that SASFAA secure a paid bookkeeper.
2. Based on the above recommendation, we are recommending the attached Bylaws changes be approved by the BOD and put forth to the membership for approval.
3. Upon approval by the SASFAA BOD, the following will occur.
 - a. Policies & Procedures changes will be submitted to the BOD.
 - b. A timeline of next steps will be provided to the BOD to include the application, job responsibilities, marketing, approval/vetting process (i.e. interviews), contract, etc.

Policy & Procedure: Changes/ Recommendations:

SASFAA Proposed Bylaws Changes

Article VI – Officers

Section 1

Current Wording:

The elected officers of the Association shall consist of a president, vice president, president-elect, immediate past president, secretary and treasurer *and treasurer-elect*, who must be active members.

Proposed Wording:

The elected officers of the Association shall consist of a president, vice president, president-elect, immediate past president, secretary, and treasurer, who must be active members.

Rationale:

Eliminating the Treasurer-elect position in order to hire a paid bookkeeper.

Article VI – Officers

Section 5

Current Wording:

The secretary and the treasurer shall serve for periods of two years. The secretary will be elected in even years. *The treasurer-elect shall be elected in even years to serve for a period of one (1) year. The treasurer-elect of the association shall automatically succeed to the office of treasurer for a two (2) year term upon expiration of the term of the office of the previous treasurer and the term of the treasurer-elect.*

Proposed Wording:

The secretary and the treasurer shall serve for periods of two years. The secretary will be elected in even years. The treasurer will be elected in odd years.

Rationale:

Eliminating the reference to the treasurer-elect and reinstating the treasurer term of service to coincide with an overlap with the secretary’s term.

Article VII – Duties of Officers

Section 7

Current Wording:

The overall function of the treasurer-elect is to assist the treasurer in all duties as outlined in the Bylaws and the SASFAA Policy and Procedures Manual. This will allow the elected individual to gain the experience needed to effectively hold the office of treasurer.

Proposed:

Eliminate this section in its entirety.

Rationale:

Required if Article VI, Section 1 is approved.

Article X – Board of Directors

Section 2(a)

Current Wording:

The president, vice president, president-elect, immediate past president, secretary, treasurer, *and treasurer-elect.*

Proposed Wording:

The president, vice president, president-elect, immediate past president, secretary, and treasurer.

Rationale:

Required if Article VI, Section 1 is approved.

Activity Summary:

- The 2019-2020 budget and fiscal records have been closed. This information has been uploaded to the SASFAA secure login section of the website. As well, an email has been sent to the membership. Here are some highlights
 - There was a net income of \$54,829.
 - A new ACH account was added to allow vendors to submit their sponsorship dollars electronically. This was a requirement for one of the vendors. This account only has the minimum required amount and is only used as a pass-through account.
 - SASFAA's assets totaled \$889,809.97 as of June 30, 2020.
- In collaboration with the treasurer, the 2019-2020 records have been submitted to the accountant Mike Dunn for the purpose of completing SASFAA's 990 tax return which is due November 15.
- October 5, 2020 – a Zoom committee meeting was held to review assigned duties and to discuss the progress regarding the viability of and need to hire a third-party bookkeeper. During this meeting it was agreed that the committee would present a proposal to the Board of Directors for their consideration during the October board meeting.
- Monthly expense reports have been scheduled on the 20th of each month. Board members should receive this information throughout the fiscal year.
- The chair has participated in multiple Zoom meetings to discuss budget re-forecasting. This was and is necessary based changing dynamics resulting from COVID. At this time, there is no recommendation for budget revisions. Rather, each chair is charged with making offsetting adjustments within each event. For example, the conference cost will be less due to going virtual. Likewise, the expected income for registration and sponsorship is expected to be less. Based on current information, these offsetting adjustments appear to balance out.

Outstanding Contractual Obligations

**Renaissance Montgomery Hotel & Spa at the Convention Center – Montgomery, AL – February 4-9, 2022
– Conference**

- Room rate is \$159 plus 15% plus \$2.25
- 1,095 contracted room nights
- \$10 rebate per room, per night will be credited to the master account
- \$65,000 F&B minimum
- Waived room rental for all hotel space with \$65,000 F&B minimum
- Complimentary Presidential Suite over conference dates
- Complimentary Governor's Suite over conference dates
- 10 Executive Suite upgrades for VIPs
- 10 Concierge Level passes for VIPs
- 1/40 comp room ratio
- Complimentary Wifi in guest rooms
- Waived fees for shipping/receiving of packages (up to 25)
- Hotel will sponsor the Saturday morning board breakfast (30 max)
- VIP amenities will be delivered to 10 designated VIPs
- Double Marriott Reward Points for planner
- 21 day cut off
- Attrition at 75%
- Group rate available 3 days pre/post based on availability
- 10% discount on spa services for all attendees
- \$3.00 discount off self-parking
- Cut-Off date is January 25, 2022

Total liability until February 3, 2021 : \$71,731.50

Hilton Myrtle Beach Resort – Myrtle Beach, SC – October 23-28, 2020

- Room rate is \$149 plus 12%
- 110 contracted room nights
- Complimentary parking
- 1 complimentary upgrade to Executive King Suite, at group rate
- 2 comp rooms if blocked filled
- Complimentary meeting room Wifi
- Event Planner – Celena Tullos will qualify for Hilton Honors Points
- Attrition at 90%
- \$4,500 F&B minimum

***Total liability after August 2, 2020: \$18,950**

*Note – President Tullos and others have negotiated, and the hotel has agreed to hold SASFAA harmless. The hotel has asked that we have a meeting during this time frame. However, we will not be held to the contracted room nights or the food and beverage minimum.

Total liability: \$90,681.50



Southern Association of Student Financial Aid Administrators

Leigh Ann Hussey & Theresa Mays/Conference 2021 Co-Chairs

Executive Board Report/October 2020

Committee Members

Leigh Ann Hussey (co-chair), Theresa Mays (co-chair), Celena Tullos, Joan Bailey, Tarik Boyd, Leah Louallen, Chad Sartini, Wayne Kruger, Stephanie Miller, Nadine Bailey, Felicia Ailster, April Tretter, Heather Dearman, Amanda Buchanan, Karen Hauser, Samantha Hicks, Beth Armstrong

Committee Goals for 2020-2021:

- Host a successful conference in a format(s) that accommodates the needs and restrictions of all SASFAA members

LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

The Conference Committee makes a motion to establish a new fee structure for this year's virtual conference. Each institution will have the opportunity to purchase conference "slots". The charge would be \$125 for the first two slots and then \$50 for each additional slot.

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

The conference committee held a September meeting to begin work on determining what a virtual conference looks like for SASFAA. Committee assignments were reshuffled to accommodate for the virtual nature of the conference. Discussions were held on platforms to host the conference and dates for the conference.



Southern Association of Student Financial Aid Administrators

Michael Birchett/Sponsorship Chair

Executive Board Report / October 2020

Committee Members

Bill Ayers (College Ave)

Rick Gallagher (Ascent)

Shannon Jones (Inceptia)

Ibis Vento (Financial Aid Professional Services)

Committee Goals for 2019-2020:

- \$25,000 in sponsorship income

LRP and GAP Goal Activity to date:

- N/A

Motion/ Action Item(s):

- 2020-2021 Sponsorship Packages

Policy & Procedure: Changes/ Recommendations:

- N/A

Activity Summary:

The Sponsorship Chair has been working with President Tulloss, Budget & Finance Chair Dill, Partner Advisory Board Chair Jones, and the members of his committee to develop a new sponsorship model to accommodate SASFAA's decision to move the annual conference to an online virtual format. This situation obviously created new and unique challenges, but the Chair feels that the committee has done an impressive job thinking of new and creative ways to partner with SASFAA's sponsors while remaining good stewards of the unique budgetary challenges.

The Sponsorship Chair has also updated the sponsorship sections of the website in preparation for the Executive Board's final decision on the sponsorship levels.

Partner Advisory Board Chair Jones has been instrumental and invaluable in assisting the Sponsorship Chair with contacting our prospective sponsorship partners and developing the products and services directory for them.



Southern Association of Student Financial Aid Administrators

Ron Gambill, Chair, Legislative Relations Committee

Executive Board Report/October 2020

Committee Members/State Executive Board:

AL	Stephanie Miller	Central Alabama Community College
FL	Wayne Kruger	St. Petersburg College
GA	Dr. Michelle Bedford	Southern Crescent Technical College
KY	Bryan Ersland	Eastern Kentucky University
MS	LaShanda Chamberlain	Mississippi Gulf Coast Community College
NC	Rachelle Feldman	UNC – Chapel Hill
SC	Adam A. Ghiloni	Tri-County Technical College
TN	Ron Gambill	Edsouth (Chair)
VA	Brad Barnett	James Madison University (State)
VA	Will Shaffner	MOHELA (Federal)

Committee Goals for 2020-2021

- Provide weekly updates for Congress when in session and other D.C. related activities impacting higher education.
- Review relevant NPRMs and Congressional legislation as appropriate for comment.
- Conduct a DC Hill visit with appropriate proposals for the HEA Reauthorization in the Spring of 2021.
- Provide a legislative webinar on the election outcome and the impact on Reauthorization.
- Develop a committee listserve and establish conference calls for committee communications.
- Have a committee member designated by the State President of each SASFAA state.

LRP and GAP Goal Activity to date:

None

Motion / Action Item(s):

None

Policy & Procedure: Changes / Recommendations

None

Activity Summary: General Update

Currently, the Federal Government is being funded based on a Continuing Resolution that was completed September 30, 2020 and extends until December 11, 2020. Prior to that date an additional Continuing Resolution will need to be passed to keep the government operating. The time frame for the next CR will be determined by the outcome of the November elections.

Although discussions continue on a second COVID-19 relief bill, the overall costs of the House and Senate proposals remain significantly different in the amount of spending. The House bill continues to have funds for non-

COVID related expenses which the Senate will not accept. Speculation ranges from a bill being passed following the elections during the “lame duck” session or waiting for the new Congress taking office in January. Although portions of the proposals are far apart, the funding for education is significantly higher than the first CARES Bill and relatively close between the two houses. The President’s proposal to pass a smaller bill with a target for the most critical needs has been rejected by the House Speaker.

The Staff Director of Policy, Bob Moran, left the Senate HELP Committee on October 9, 2020 to take a position with Bose Public Affairs Group’s DC office to serve on the Federal Relations Team. Bob was consistently willing to provide time to SASFAA delegations conducting DC Hill visits.

Committee goals will be reviewed understanding that COVID-19 has controlled the options for in-person meeting. We will need to be ready for a virtual year under current circumstances.



Southern Association of Student Financial Aid Administrators

Wayne Kruger / Membership Chair

Executive Board Report/October 2020

Committee Members: None at this time.

Committee Goals for 2020-2021: Continue to maintain the membership database, create a who do document to leave for future membership chairs on how to merge accounts and how to keep the database clean as well as keep up the membership tracking documents. Try to maintain membership through COIVD-19 as close to previous levels.

LRP and GAP Goal Activity to date: See below.

Motion/ Action Item(s): None at this time

Policy & Procedure: Changes/ Recommendations: None at this time

Activity Summary: Worked with the electronic services chairs, president, and treasurer to clean up an issue within wild apricot that was affecting how members renewed and what events they can see. Used a batch update process to fix the issue and then sent out an updated membership renewal email to members that have not yet renewed. Continued to assist members with renewal issues and questions. Began a review of the membership database to clean up duplicate or bad account.

2020-2021 membership data:

We have 644 active members for this yer compared to 719 for 2019-2020 and 645 compared to 2018-2019. That means for now we have a 14.7% decrease so far over last year but only a 4.96% decrease over two years ago. Given COVID-19 and other issues in the country right now that decrease is less currently then we have budgeted for. Below is a breakdown of various categories of membership so we might see where we are doing well and where we are struggling. Perhaps we can do some more targeted membership emails going forward to try to boost membership.

	<u>2017- 2018</u>	<u>2018- 2019</u>	<u>2019- 2020</u>	<u>2020-2021</u>	<u>% for current</u>
Active	575	645	719	613	95.19%
Associate	15	17	15	14	2.17%
Honorary	40	5	7	16	2.48%
Retired	1	1	1	1	0.16%
<u>Total</u>	631	668	742	644	100.00%
-					
Alabama	37	42	45	46	7.14%
Florida	77	89	102	64	9.94%
Georgia	69	72	99	108	16.77%
Kentucky	51	48	57	36	5.59%
Mississippi	22	30	24	36	5.59%
North Carolina	85	98	102	66	10.25%
South Carolina	108	125	130	103	15.99%

Tennessee	63	73	74	88	13.66%
Virginia	55	60	71	60	9.32%
Other	23	31	38	37	5.75%
Total	590	668	742	644	100.00%
Public (4 Year)	n/a	243	283	178	27.64%
Private non-profit (4 Year)	n/a	177	188	202	31.37%
Public (2 Year)	n/a	99	121	125	19.41%
other	n/a	37	38	28	4.35%
Graduate/Professional	n/a	28	19	15	2.33%
Government Agency	n/a	18	13	11	1.71%
Lender	n/a	13	16	20	3.11%
Consultant	n/a	9	14	13	2.02%
Guaranty Agency	n/a	9	9	9	1.40%
Servicer	n/a	8	9	4	0.62%
Private non-profit (2 Year)	n/a	7	6	9	1.40%
Not Specified	n/a	6	6	8	1.24%
Private for profit (Business School)	n/a	5	5	8	1.24%
Private for profit (Technical/Trade)	n/a	5	9	10	1.55%
Secondary Market	n/a	2	2	2	0.31%
Retired Financial Aid Professional	n/a	2	2	2	0.31%
Health Related/Nursing	n/a	0	2	0	0.00%
Total	n/a	668	742	644	100.00%
Male	n/a	164	189	454	70.50%
Female	n/a	479	515	165	25.62%
Not Specified	n/a	25	38	25	3.88%
Total	n/a	668	742	644	100.00%
White/Caucasian	n/a	445	477	413	64.13%
Black/African American	n/a	134	163	142	22.05%
Not Specified	n/a	60	65	61	9.47%
Hispanic/Chicano/Mexican American	n/a	19	22	17	2.64%
Asian/Pacific Islander/Filipino	n/a	10	14	10	1.55%
Native America	n/a	0	1	1	0.16%
Total	n/a	668	742	644	100.00%
As of date:	9/20/2017	9/20/2018	9/20/2019	10/15/2020	



Southern Association of Student Financial Aid Administrators

Chad Sartini/ Site Selection Chair

Executive Board Report/October 2020

Committee Members: Nathan Basford

Committee Goals for 2020-2021: Ensure timely communication with board and membership regarding meeting and event sites.

LRP and GAP Goal Activity to date: none

Motion/ Action Item(s): none

Policy & Procedure: Changes/ Recommendations: none

Activity Summary:

- Worked with Hilton Myrtle Beach on plans for the fall board meeting (reservations, meals).
- Met with Marriott in Montgomery to discuss options for the upcoming conference and potential for rescheduling to next year. The site offer 2/4/2022-2/9/2022 as dates for rescheduling. Proposed dates sent to board for discussion.



Southern Association of Student Financial Aid Administrators

Theresa Mays/Global Issues

Executive Board Report/October 2020

Committee Members

Laticia Dubose, *Enterprise State Community College, AL*

Jeff Daniels, *PNC Banking, FL*

Eric Farmer, *TN Student Assistance Corporation, TN*

Wilmani Humphries, *Univ. of West GA, GA*

Cedric Trigg, *Univ of Louisville, KY*

Mike O'Grady, *VA*

Aesha Greene, *UNC-Chapel Hill, NC*

Terria Williams, *Claflin Univ, SC*

Regina Gilbert, *Lipscomb Univ., TN*

Committee Goals for 2020-2021:

Ensure that all training provided is inclusive of all those that are served.

Obtaining active representation from each state, enhance the diversity of the organization.

Work to develop topics for the annual conference and training/workshops that focus on diversity and current global issues.

Work to determine article content needed for SASFAA Nine News

LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

Working closely with the conference committee to determine session topics to addressing diversity related issues.



Southern Association of Student Financial Aid Administrators

Dameion Lovett/President, Florida

Executive Board Report/October 2020

Committee Members (FASFAA Executive Board Members)

- President-Elect/Nominations, Katie Conrad, Florida International University (V)
- Past President/Fiscal Concerns, Daniel Barkowitz, Valencia College (V)
- Vice-President of Training, Nadine Bailey, Ultimate Medical Academy (V)
- Secretary, Jenny Cun, University of South Florida (V)
- Treasurer, Eileen Brzozowski, Easter Florida State College (V)
- Treasurer-Elect, Kylie Gross, University of Tampa (V)
- Region I Representative, Shana Gore, University of West Florida (V)
- Region II Representative, Chas Hammond, University of Florida (V)
- Region III Representative, Abigail Troche, University of Central Florida (V)
- Region IV Representative, Kimberly Gloster, Florida Gulf Coast University (V)
- Region V Representative, Jessica Ly, Florida International University (V)
- Member At Large—Conference Chair, Joan Bailey, University of South Florida (V)
- Member At Large—Federal/State Legislative Chair, Wayne Kruger, St. Petersburg College (V)
- Member At Large—Global Issues Chair, Jeff Daniels, PNC Bank (V)
- Member At Large—Vendor/Sponsorship Chair, Laura Dickerson, Sallie Mae (V)
- Member At Large—Site Selection Chair, Irma Molinares, ECMC (V)
- Electronic Services, Jerry McMahon, Keiser University
- Early Awareness/Outreach/Financial Literacy Chair, Kimberly Lent, Florida College Access Network
- Graduate/Professional (Private/NP, FP) Chair, Brenda Noblitt, University of Florida
- Vocational/Technical/Clock Hour Chair, Teriann Wright, Orange Technical College
- Florida Office of Student Financial Assistance Liaison/Newsletter, Louanne Standley, Florida Dept. of Education
- Bookkeeper, Gwyn Francis, FASFAA Lifetime Member

Committee Goals for 2020-2021 (FASFAA Executive Board):

1. Increase FASFAA's participation in supporting the Florida College Access Network to help high school students successfully complete the FAFSA. In order to successfully complete this task, FASFAA will provide financial aid training for high school guidance counselors to assist in their preparation of college bound seniors in the financial aid process.
 - a. Promote FAFSA awareness throughout the state by partnering with OSFA
 - b. Partner with high school districts across the state to promote FAFSA completion
2. Increase membership and facilitate the participation of members as volunteers.
3. Create an open pipeline of members who can serve on committees to help further the completion of goals throughout the year.

LRP and GAP Goal Activity to date: N/A

Motion/ Action Item(s): N/A

Policy & Procedure: Changes/ Recommendations: N/A

Activity Summary:

- Held three board meetings since the last report
- FASFAA has held webinars on Returning to Campus During COVID-19 and NASFAA Federal & Legislative Update
- FASFAA has held one NASFAA Credential Training Session on R2T4 on October 16th to 107 members.
- FASFAA Annual Clock Hour Workshop scheduled for October 26-30—206 registrants
- Financial Literacy for Graduate/Professional Schools scheduled for November 2nd
- State of Florida Office of Student Financial Assistance Update webinar scheduled for November 4th
- NASFAA Credential Training on Professional Judgment scheduled for November 13th
- Currently working with State of Florida (OSFA), FCAN, & community organizations to launch FAFSA virtual sessions, virtual FAFSA help session office hours and guidance counselor trainings
- Reconvened Business Partner Advisory Board
- Formalized and released Sponsorship Prospectus for Business Partners
- Designated four task forces for the year
 - Virtual Annual Conference
 - FASFAA P&P Appendix
 - Website Review/Improvement
 - Long Range Strategic Plan



Southern Association of Student Financial Aid Administrators

Maria Hammett/President, Georgia

Executive Board Report/July 2020

Committee Members

Past President - Lakisha Sanders, Clayton State University

President Elect – Angela Tate, Lanier Technical College

Vice President for Professional Development - David McMillion, University of North Georgia

Program Chair – Aria Simmons, Georgia State University

Treasurer – Jill Towns, Georgia Military College

Treasurer-Elect - Dustin McDaniel, Technical College System of Georgia

Secretary - Shannon Simmons, Georgia College and State University

Budget & Finance Chair - Pennie Strong, Georgia Student Finance Commission

Diversity Program Chair – Wilmani Humphries, University of West Georgia

Communications & Community Action Chair – Pirone, Melodie, Southern Crescent Technical College

Vendor/Sponsor Chair – Joseph Buchholz, Georgia Gwinett College

Technology – Emmilee Mitchell, Mercer University

Membership Development Chair – Kimberly Jordan, Georgia Gwinett College

Legislative Affairs Chair – Nancy Ferguson, University of Georgia

Leadership & Mentorship Chair –Felecia Ailster, Georgia Piedmont Technical College

Committee Goals for 2020-2021:

Be Positive – Be Strong – Be Kind – Be Creative – Be Well – Give Grace

- **Work with Budget and Finance to create a budget that is consistent with our circumstances this year:**
 - Revenue
 - Survey membership to determine what constraints COVID or Budgets may have on their ability to pay or meet in person.
 - Survey Sponsorship Partners to determine how this year will impact their services and funding. Be creative with ways to support our sponsors while they support us.
 - Based on survey, Board discussion, Past President Review, and consulting with neighboring Associations, establish pricing.
 - Expenses
 - Budget and Finance outline fixed expenses
 - Determine cost of meeting software.
- **Relevant – GASFAA needs to remain relevant to our members.**
 - What do they need?
 - How have their needs changed?
 - What vital training can we provide? New staff members, directors, CARES, State, etc.
 - Letter's to Directors and Presidents – Expressing how GASFAA is stepping up to provided necessary training in relevant areas.
 - Meet with each individual Board Member and discuss as a Board the creative ways to work through this year.
 - Trainings
 - Webinars
 - Meetings
 - Conference

- **Hotel Contracts for the Conference**
 - Determine when and how we cancel spring conference hotel contract if needed.
 - Determine if we sign contract for 2022.
- **Board Report Process**
 - Build on Report each time we meet.
 - Send ahead for Board to review
 - Present action items at meeting for discussion
 - Create template for minutes
- **Diversity** - Very important to me to be creative in our communications and actions in regard to diversity and inclusion. I want to brainstorm what we can do as an Association.
- **Setting the Culture for our Board** - With every problem there is an opportunity. You always move forward. There is always an answer to a problem.
 - Prepare for Every Possibility – We are not going to have all the answers right now. We must think through possibilities and be prepared for changing scenarios. We do have some things we “know” right now and we prepare for the others.
 - Define our Reality Right Now – Confront our situation as we know it to make plans for how we will respond to meet our member’s needs. Create a defined measurable plan.
 - Communicate Often – We will have a consistent form of communication throughout this year.
 - Learn to Grow – Law of the rubber band. If you are not being stretched you’re now growing.
 - Strategic Plan – Be purposeful
 - Give Grace – Be kind to each other and forgiving.

LRP and GAP Goal Activity to date:

None.

Motion/ Action Item(s):

Motion and Action on Membership pricing. Cannot release yet until we announce to membership.

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

- July 21, 2020 - GASFAA Transition meeting I
 - Closed out the year and had each board member meet with the board member serving in their role from the previous year.
- July 24, 2020 – GASFAA Transition meeting II
 - Created electronic Workbook that pulled together all of our materials instead of the paper notebook version.
 - Discussed budget and what fixed expenses we would experience for this year.
 - Budget and Program Chair to meet with hotel in regard to contract.
- August 3, 2020 – Membership and Training Pricing
 - Determine Membership pricing
 - Set recurring meeting time.
 - Complete address list
 - Forms to sign

- Set up meeting with Professional Development, Vendor/Partnership, Technology, and Budget/Finance to discuss training webinars.
 - Named Michelle Bedford Legislative representative from GASFAA
- August 19, 2020 – GASFAA Board Planning Meeting
 - Webinar package discussion
 - Volunteer list reviewed
 - Newsletter to be discussed
 - Sponsor Partnership pricing discussion
 - Webinar software package discussion
- August 31, 2020 – GASFAA Board Planning Meeting
 - Budget line item review
 - Webinar pricing finalized
 - Webinar Software package finalized
 - Membership roll-out plans
- September 3, 2020 Partnership Package approved
- September 30, 2020
 - Webinar Series Discussion
 - Join SASFAA
 - Zoom
- October 15, 2020
 - Announcement for webinar series
 - Directors' Day
 - Treasurer a. Credit card b. P.O. Box c. BMI invoice
 - Board Reports a. Frequency since we are meeting so much.
 - First meeting of each month
 - Sent hotel information to President Elect
 - October 19, 2020
 - Selected two members for Leadership Symposium
 - Jessica Alston – Georgia Piedmont Technical Collette
 - Alyson Smith – Georgia College and State University



Southern Association of Student Financial Aid Administrators

Michelle Standridge/President, Kentucky

Executive Board Report/October 2020

Committee Members

N/A

Committee Goals for 2020-2021:

N/A

LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

Kentucky Association of Student Aid Administrators have scheduled a series of 6 virtual trainings has been established to help support KASFAA's mission during the COVID pandemic.

September 29, 2020	Cyber Security
October 20, 2020	Conflict Management
November 10, 2020	Verification
February 9, 2021	SAR Comment Codes
March 9, 2021	Ethics
April 13, 2021	R2T4

KASFAA had a successfully virtual fall conference throughout the week of October 5-9th. Training opportunities included a federal update, KHEAA update, 9 breakout sessions and other opportunities to support the membership and allow for networking.

President Standridge called a virtual Executive board meeting on August 18th, to approve fall sponsorship levels since all fall trainings will be remote, the virtual training series dates as well as to reduce the virtual training fee to mirror the cost of membership.

President Standridge attended the recording of the KET Financial Aid Call in show on September 23, 2020. Stephany Blaney worked with KET to arrange a panel consisting of President Standridge, Michael Birchett, Runan Evans and Amy Smith. The panel taped the show to be aired on October 26th at which time there will be a small, remote group of KASFAA members ready to answer a phone bank set up by KHEAA.

KASFAA's spring conference is planned April 14-16, 2022 at the Clarion Hotel in Lexington, KY and the planning committed will continue to evaluate if that training will need to move to virtual.



Southern Association of Student Financial Aid Administrators

Renotta Shed/President, Mississippi

Executive Board Report/October 2020

Committee Members

N/A

Committee Goals for 2020-2021:

N/A

LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

N/A



Southern Association of Student Financial Aid Administrators

Kamesia House/President, North Carolina

Executive Board Report/October 2020

Committee Members

N/A

Committee Goals for 2020-2021:

- Observe/Understand my role on SASFAA's board
- Analysis and determination of diversity gaps in membership and leadership-reiterate NCASFAA/SASFAA's commitment to diversity and inclusion
- Coordinate/collaborate with committee to strengthen business partnerships
- Partner with SASFAA, Financial Aid Director's meeting
- Partner with SASFAA President for a Lunch & Learn

LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

NCASFAA'S Fall Virtual Conference, October 29-30, 2020. We are planning an educational/fun-filled two-day event. We have had several amazing and engaging webinars to date. President Tulloss will be providing the SASFAA update.



Southern Association of Student Financial Aid Administrators

Traci Singleton/President, South Carolina

Executive Board Report/October 2020

Elected Officers for 2020-2021:

President	Traci Singleton, The Citadel
Past President	Melanie Gillespie, Southern Weleyn University
President-Elect	Carolyn Sparks, Wofford College
Vice President	Justin Pichey, Columbia College
Secretary	Michelle Upchurch, Converse College
Treasurer	Samantha Hicks, Coastal Carolina University
Treasurer-Elect	Miracle Mosley, Winthrop University
Member At Large	Regina Hailey Smith, University of SC Trio Program

Theme for the year: Plugged into Personal Care and Mental Health.

Purpose of the Theme and focus: As we go through the current climate of the world, we must plug in and stay abreast of the current changes. Changes from the Department of Education, day to day changes at our schools and even changes with our family and friends.

This academic year as we go through the changes we have to practice self-care and take care of our mental health, not only for ourselves but to make sure we are able to serve our students and understand what they too may be going through.

Past events: SCASFAA Transition Board Meeting was held June 22nd-23rd. We also have had a few Coffee time chats (virtual discussions with members on a topic picked for the week).

Current events/activities: Our Global Issues Committee is sharing quotes, and information about mental health/self-care weekly

SCASFAA Virtual Annual Conference: Thursday, October 1, 2020- Thursday, October 29, 2020. Sessions have been presented; scheduled for about 1 hr, to 1.5 hr. Our Immediate Past President Bill Spiers presented the update for the association on Thursday, October 15th. Below is a copy of our conference program:

https://www.scasfaa.org/resources/CONFERENCE/2020_Virtual/2020ConferenceAgenda.pdf

Upcoming events/activities: Webinars will be scheduled by our Professional Development Committee from November- June.



Southern Association of Student Financial Aid Administrators

Danette Seale/President, Tennessee

Executive Board Report/October 2020

Committee Members

TASFAA Executive Board (Voting Members)

President	Danette Seale	Carson-Newman University	4 Year Private
President-Elect	Jeff Norrod	TN Technological University	4 Year Public
Past President/Nominations & Elections	Joe Myers	Motlow State Community College	2 Year Public
Secretary	Tina Rich	Carson-Newman University	4 Year Private
Treasurer	Ashley Edens	Tusculum University	4 Year Private
At-Large Member	Jonathan Looney	Sallie Mae	Vendor
4 Year Private Sector Representative	Chanell Thomas	Vanderbilt University	4 Year Private
4 Year Public Sector Representative	April Wolford	University of TN, Knoxville	4 Year Public
Proprietary Sector Representative	Randy Cotterell	Mind Body Institute, LLC	Proprietary
2 Year Public Sector Representative	Jennifer Byrd	Nashville State Community Coll.	2 Year Public
TN College of Applied Tech. Sector Rep.	Cindy Palmer	TCAT-Jackson	TCAT

TASFAA Committee Chairs (Non-Voting Members)

Association Governance	Jeff Gerkin	University of TN, Knoxville	4 Year Public
Awards	Bill McCord	Middle TN State University	4 Year Public
Budget and Finance	Melissa Smith	Vanderbilt University	4 Year Private
Conference Chair	Jo Wallace	TCAT-McKenzie	TCAT
Diversity	Eric Farmer	TN Student Assistance Corp.	State Agency
Electronic Services	Laura Harkleroad	University of TN, Knoxville	4 Year Public
Governmental Relations	Ron Gambill	Edsouth	Non-profit
Historical	Kacee Hardy	Dyersburg Community College	2 Year Public
Membership	Charles Harper	Belmont University	4 Year Private
Public Relations/Blog	Haley Greenway	TCAT-Elizabethton	TCAT
Site Selection	Leah Louallen	TN Student Assistance Corp.	State Agency
Sponsorship	Karyn Allen	Rhodes College	4 Year Private
State Programs Liaison	Darolyn Porter	TN Student Assistance Corp.	State Agency
Training	Samantha Sullivan	Vanderbilt University	4 Year Private

Committee Goals for 2020-2021:

TASFAA Goals

- Enhance the value of TASFAA membership through free webinars and WebEx/Zoom meetings that will provide opportunities for professional growth, collaboration, and mutual support
- Increase membership in TASFAA by promoting new opportunities available
- Encourage new and meaningful opportunities for our sponsors to support the mission of TASFAA
- Provide the annual spring conference at the Cool Springs Marriot in Franklin, TN in April 2021
- Ensure that TASFAA is represented at all SASFAA Board meetings
- Encourage TASFAA members to join SASFAA, if not already a member
- Encourage TASFAA participation in SASFAA events
- TASFAA President-Elect will participate in the SASFAA Presidents' exchange
- TASFAA will send up to four Clyde Walker Scholarship recipients to the Summer 2021 SASFAA New Aid Officers Workshop

LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

President Seale attended the SASFAA Executive Board meetings August 4 & September 15, 2020 via zoom. Ron Gambill, TASFAA Governmental Relations Chair, will represent TN on the SASFAA Legislative Committee. Eric Farmer, TASFAA Diversity Chair will represent TN on the SASFAA Global Issues Committee. Additionally, Seale shared the SASFAA NAOW opportunity to TASFAA members via email on September 29, 2020. Mrs. Seale also selected the SASFAA Leadership Symposium Attendees as requested by President Tulloss. TASFAA normally pays for one rising leader to attend the symposium. Since the cost is lower, travel is not an expense, and the budget line item can support it, Seale approved for two to be comped by TASFAA this year. Thank you, President Tulloss, and the SASFAA Executive Board for continuing to provide this valuable leadership opportunity, as well as paying for one attendee from TASFAA. The representatives from TASFAA are Jo Wallace, TASFAA Conference Chair; Jeff Norrod, TASFAA President-Elect; and Ashley Edens, TASFAA Treasurer.

The months of August, September, and October have been busy for TASFAA. Seale attended a TASFAA Conference Committee meeting on August 5, 2020 via WebEx where the conference committee decided to establish a virtual subcommittee and develop a contingency plan should the in-person conference not be able to be held April 2021.

Seale held a TASFAA Executive Board meeting on August 6, 2020 via WebEx. President Seale's zero-based budget for 2020-2021 that allows for use of reserve funds to be incorporated was approved, anticipating the possible financial challenges due to COVID-19. Seale also facilitated a discussion during the meeting at the request of Bob Moran, Education Policy Director and HELP Committee member (now former member), in conjunction with Ron Gambill, Governmental Relations Chair, regarding the requests schools receive and supply for disclosure of scholarship information to outside providers. Ron Gambill complied the responses to provide to Bob Moran.

Seale attended a TASFAA Virtual Conference Subcommittee meeting on September 1, 2020 via WebEx and held another Executive Board meeting via zoom on September 3, 2020 to review and to confirm dates and plans.

On September 9, 2020, the TASFAA Membership Chair, Janette Overton, resigned due to family and work obligations. Charles Harper agreed to serve as the TASFAA Membership Chair for the remainder of the year. The committee member listing for this report reflects this change to the TASFAA Executive Board.

Seale sent a welcome back email/blog to the TASFAA membership September 10, 2020 to inform the membership of upcoming training and networking opportunities, and to encourage membership renewal and to volunteer.

On September 17, 2020, the first ever Welcome Back & Kickback Mixer via zoom was held in conjunction with the TASFAA Diversity Chair, Eric Farmer (aka DJ Ego) and the Past-President of FASFAA, Daniel Barkowitz, joined the mixer too.

TASFAA hosted a TSAC Q&A Webinar via zoom on September 24, 2020, which was well received with 159 pre-registered and an estimated 119 joined live. A huge thank you to Leah Louallen for her work in getting TSAC panel members for the webinar, as well as being a panelist also!



As mentioned in the last board report, the TASFAA board was challenged by Seale to identify *Golden Opportunities* for TASFAA to serve our members in new ways that promote professional preparation and growth, collaboration, and mutual support of our diverse membership, and

incorporate those opportunities into their goals for this year. To that charge, Ashley Edens, TASFAA Treasurer, created the idea of the *Drive-In to Your Future FAFSA Event* to help families complete the FAFSA in a safe socially distanced creative way amid this pandemic. The TASFAA Drive-In FAFSA Event Task Force was created and met only once via zoom on September 22, 2020 to discuss details, the date, and assign tasks. To say that this has been a “*Fast and Furious*” *Edition* of accomplishing a task would be an understatement! After that meeting, many tasks were completed quickly. SASFAA’s own Leah Louallen worked her magic in getting the statewide sign-up for students going and helped launch the event to high schools. Incredibly, through quick collaboration between the TASFAA Executive Board, THEC/TSAC, Seale’s University Marketing Team (logos & flyer for branding), TASFAA member campuses, high schools, and volunteers, this creative FAFSA completion event was launched during first week in



October! The *Drive-In to Your Future FAFSA Event* is being held on October 29, 2020 across the state, and students are currently signing up to *Drive-In* to receive expert help in completing their FAFSA. It would be amazing to have other SASFAA states participate in more drive-in events this year. President Seale would be happy to share the marketing materials, and any of the steps taken so far to help. If you are interested in hosting a *Drive-In to Your Future* event later, please let Seale know, as there is no need to reinvent the wheel.

The TASFAA Executive Board voted via email to become a Distributing Partner for NASFAA’s Student Aid Redesign, and Seale notified NASFAA’s Justin Draegar on October 2, 2020.

The TASFAA Conference Committee and Executive Board members met October 8-9, 2020 at the Cool Springs Marriot in Franklin, TN. Members restricted from travel joined via zoom. It was very nice to finally meet in person for those that were able to *drive-in* and attend. The TASFAA Executive Board voted to approve a debit card usage for the Treasurer and President, reviewed reports, and talked about the upcoming Drive-In FAFSA Event, and the other “TASFAA Thursday” webinars scheduled over the next five weeks for the TASFAA membership, made possible through several business partners.

The next TASFAA Conference Committee and Executive Board meetings are planned for January 7-8, 2021 at the Cool Springs Marriot in Franklin, TN. The TASFAA Annual Spring Conference is currently still scheduled for April 18-21, 2021 at the Cool Springs Marriot in Franklin, TN.



Southern Association of Student Financial Aid Administrators

Sherika Charity/President, Virginia

Executive Board Report/October 2020

Committee Members (no changes from September report)

VASFAA 2020-2021 Board

President	Sherika Charity
Past President	Brad Scaggs
President-Elect	Beth Armstrong
Secretary	Christina Russell
Treasurer	Marc Vernon
Treasurer-Elect	Teresa Harrison
Representative-at-Large	Scott Morrison
Representative-at-Large	Laurie Owens
Representative-at-Large	Joe Dobrota
Representative-at-Large	Kesha Wilson

VASFAA Committee

Budget & Finance Chair
Funds Manager
Asst Funds Manager
Social Media
Development Partner
Membership
Secondary Schools/Awareness/Diversity
Government Relations
Newsletter
Site Selection/Training
Conference
Electronic Services

2020-2021 Chair Name

Aaron Whitacre
Vern Fairchilds
Chad Sartini
Shannon Turner
Janee Knippenberg
Lisa Johnson
Mike O'Grady/Jack Zeeger
Will Shaffner/Brad Barnett
Megan Hartless
Andrew Quinn
Patrice Johnson
Mayra Vazquez

Committee Goals for 2020-2021:

No changes from September report.

LRP and GAP Goal Activity to date:

NONE.

Motion/ Action Item(s):

NONE.

Policy & Procedure: Changes/ Recommendations:

NONE.

Activity Summary:

VASF AA Fall Non-Conference Training (virtual):

- October 9, 2020 (65 attendees)
- October 16, 2020
- October 23, 2020

Fall Board Meeting (virtual): October 2020

VASF AA Partners with SCHEV & ECMC to host Financial Aid 101 Webinars for students/their families (virtual):

- October 15, 2020
- November 19, 2020
- January 21, 2021
- February 18, 2021

Tax Trainings with Robert Weinerman from Iron Bridge Resources (virtual):

- November 10, 2020
- December 8, 2020
- January 19, 2021

VASF AA President Presents at VCAN Conference (virtual): December 2, 2020



Southern Association of Student Financial Aid Administrators

Jacquelyn LeSueur/Special Project

Diversity Leadership Program

Executive Board Report/October 2020

Committee Members

- Marian Dill
- Leigh Ann Hussey
- Bryan Erslan
- Dameion Lovett

Committee Goals for 2020-2021:

Creating a proposal to present to the SASFAA Board on why SASFAA should establish a Diversity Leadership Program (DLP) specifically for our region.

LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

- Meeting with the DLP Committee via Zoom on this week
- Collecting data
- Outlining a structure for the DLP (information obtained from NASFAA)
- Benefits of a DLP for both the participants and the region



Southern Association of Student Financial Aid Administrators

Bryan Erslan/Special Project - Mentoring Guide

Executive Board Report/October 2020

Committee Members/State Executive Board:

Bryan Erslan, Eastern Kentucky University – Chair
Chad Sartini, Virginia Tech
Heather Boutell, Vanderbilt University School of Medicine
Steve Smith, University of West Alabama
Jacquelyn LeSueur, Mississippi University for Women

Committee/State Goals for 2020-2021:

I am excited about the group of individuals who have agreed to serve with this taskforce. This taskforce has been formed create a new SASFAA Mentorship Guide. While SASFAA has been a leader in association work developing new leaders in financial aid, we have not documented all of the mentorship efforts and to outline all that SASFAA is doing with regards to mentorship.

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

General Updates:

The taskforce held the first meeting, Monday afternoon, October 19th with a zoom meeting at 3 pm. Taskforce members brainstormed all the ways SASFAA mentors new members and well as veteran administrators. Chair Erslan is working on putting together an outline of what the Guide will look like and will have it back out to the group by the end of November.

The group also talked about other ways SASFAA might be able to mentor its membership and a section in the guide will include recommendations to the SASFAA Board for things to consider this year or future years.

The Taskforce will meet again in December to review the outline and make recommendations moving forward.



Southern Association of Student Financial Aid Administrators

Shannon Jones/Special Project – Partner Advisory Board

Executive Board Report/October 2020

Committee Members: Michael Birchett, University of Kentucky

Shannon Jones, Inceptia

Committee Goals for 2020-2021:

1. To engage all business partners on a regular basis to seek new ideas.
2. To engage all business partners on a regular basis to gain knowledge on how we can improve their experience with SASFAA.
3. To engage all business partners on a regular basis to get feedback on what has been positive about their experience with SASFAA and what can we do better.
4. To stay in contact with each business partner to include them as we make plans for SASFAA 2021.

LRP and GAP Goal Activity to date:

This core value will be focused upon as we move through the year - INCLUSIVITY: SASFAA will cultivate a community where ideas are respected, collaboration is fostered and every member feels welcome.

- All current vendor sponsors have been contacted to gather information for our proposed new “SASFAA Vendor Directory”.
- This directory would be aimed at making it more convenient for the membership to know which vendors support SASFAA in conjunction to their product or service offering. This will be a directory by product and or service. It will list the name of the company, contact information and website to find additional information.

Motion/ Action Item(s):

- Sponsorship Committee Chair, Michael Birchett, will be making the motion to potentially have the “SASFAA Vendor Directory” included as a value add in the vendor sponsor packages.

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

- Have reached out to the Vendor community to seek ideas and input for the proposed directory.
- The directory has evolved as discussions have progressed.
- The directory would be housed on the SASFAA website as well as distributed to the membership on a regular basis as updates occur.