

Southern Association  
of Student Financial  
Aid Administrators  
August 2021



Agenda and  
Board Reports

Prepared by Secretary Sarah Dowd

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**AGENDA**  
**SASFAA Board Meeting**  
**August 6-8, 2021**  
**Embassy Suites Airport, Nashville, Tennessee and Zoom**

<b>Date</b>	<b>Event</b>	<b>Location</b>
<i>Friday, August 6</i>	Travel Day Dinner - TBD	
<i>Saturday, August 7</i>		
8:00 AM – 9:00 AM	State Presidents Meeting	Tennessee/Virginia
9:00 AM - Noon	Board Meeting	Tennessee/Virginia
9:00 AM	Call to Order	Celena
	Roll Call / Establish a Quorum	
<i>Action Item:</i>	<i>Approval of Agenda with authority given to the President to make changes as needed in order to facilitate the flow of business.</i>	
	Motion/Action Items	Celena
<i>Action Item 1:</i>	<i>Change the name of Global Issues Committee to Equity, Inclusion, and Global Issues Committee</i>	
<i>Action Item 2:</i>	<i>Approval of 2021-22 Operating Budget and</i>	
<i>Action Item 3:</i>	<i>Vote on site proposals for fall management institute training</i>	
Noon – 1:00 PM	Lunch	Atrium
1:00PM – 5:00PM	Board Meeting	Tennessee/Virginia
1:00 PM	Call to order	Celena
	Round of Successes (2-3 minutes each)	All
	New Business	Celena
	Old Business	Celena
	Adjournment	Celena
	<b><i>Dinner TBD</i></b>	
<i>Sunday, August 8</i>	Travel Day	



**Southern Association of Student Financial Aid Administrators**

**Celena Tulloss/President**

**Executive Board Report/August 2021**

**Committee Members:**

Past SASFAA Presidents will be utilized as an advisory group

**Committee Goals for 2022-2022:**

- Review Bylaws and Policies and Procedures for accuracy, completeness and compliance
- Strengthen Business Partner relations and opportunities for input
- Begin to transition the Executive Board to an Association Governance model
- Create Board position description documents with estimated time commitment and responsibilities
- Review and update the volunteer form process
- Review the member statuses and online renewal process
- 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, through the inaugural year of the SASFAA Diversity Leadership Program

**LRP and GAP Goal Activity to date:**

**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, Conference Co-Chairs, Vice-President and Sponsorship to review budget amounts

NASFAA –

- Attended NASFAA Board Meeting July 15, 2021 via Zoom
- Attended NASFAA Regional Presidents meeting August 3, 2021 via Zoom



**Southern Association of Student Financial Aid Administrators**

**Michael D. Morgan / President-Elect**

**Executive Board Report/August 2021**

**Committee Members**

- Conference Chair- Stephanie Miller, Dir. of Financial Aid, Central Alabama Community College, (256)215-4251
- Other Committees to be determined over the next 4.5 months.

**Committee Goals for 2020-2021:**

- Select 2023 conference location with a flexible contract in a central location or location which can draw the most members.
- To build committees representative of each state in the association with the goal of collaboration and inclusion.
- Virtually meet with state presidents-elect throughout the year to prepare for 22-23 and to build cohesion within SASFAA.
- Work closely with VP to continue the education and training opportunities for the members of the association.
- Participate in the NASFAA Leadership Conference.
- Conduct Pres-Elect Workshop

**LRP and GAP Goal Activity to date:**

None at this time

**Motion/ Action Item(s):**

None at this time

**Policy & Procedure: Changes/ Recommendations:**

None at this time

**Activity Summary:**

None at this time



**Southern Association of Student Financial Aid Administrators**

**Bill Spiers / Past President**

**Executive Board Report / June 2021**

**Committee Members**

Stephen Adcock, Dameion Lovett, Maria Hammett, Michelle Standridge, Renotta Shed, Kamesia House, Traci Singleton, Danette Seale, Sherika Charity

**Committee Goals for 2021-2022:**

- Provide assistance to the President as is needed.
- Provide a dual slate of candidates to the membership for open positions.
- Provide the board recommendations for awards.
- Recommend one person for the NASFAA award.
- Complete the GAP report.
- Finish the SASFAA Civility Policy

**LRP and GAP Goal Activity to date:**

Attended the NASFAA Board Meeting.  
Provided the Nominations and Elections Committee with copies of the By-Laws and Policy and Procedures Manual on responsibilities.  
Had a Zoom meeting with the Nominations and Elections Committee

**Motion/ Action Item(s):**

**Policy & Procedure: Changes/ Recommendations:**

As the membership now provides the recommendations for candidates, we should explore the option of removing the requirement for nominations from the floor. It is generally considered this is not required under Robert's Rules of Order, Revised.

**Activity Summary:**



**Southern Association of Student Financial Aid Administrators**

**Leigh Ann Hussey / Vice President**

**Executive Board Report / August 2021**

**Committee Members**

April Tretter – NAOW Curriculum Coordinator

**Committee Goals for 2020-2021:**

- Host 4 webinars for membership
- Host SASFAA Management Institute
- Host a pre-conference workshop
- Host an in person (if possible) New Aid Officer Workshop

**SASFAA LRP and GAP Goal Activity to date:**

**Motion/ Action Item(s):**

**Policy & Procedure: Changes/ Recommendations:**

**Activity Summary:**

- Organizing a panel style webinar for HEERF III and new verification guidelines. This should be planned and announced by the time the board meets.
- Working with Joan to gather site proposals for a SASFAA Management Institute in November. At the beginning stages of organizing the institute by gathering topic ideas, instructor/presenters/etc. Will announce to membership soon.
- In early stages of talk with April Tretter regarding 2022's NAOW.



**Southern Association of Student Financial Aid Administrators**

**Sarah Dowd / Secretary**

**Executive Board Report / August 2021**

**Committee Members**

Nancy Ferguson, University of Georgia

\*Will recruit more in the coming weeks

**Committee Goals for 2020-2021:**

- 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

**SASFAA LRP and GAP Goal Activity to date:**

**Motion/ Action Item(s):**

**Policy & Procedure: Changes/ Recommendations:**

**Activity Summary:**

- Gathered and documented board members' signatures
  - Confidentiality
  - Conflict of Interest
  - Rules of Engagement
- Sent report notices, reminders
- Compiled reports and agenda for August 7 meeting of the board
- Prepared meeting supplies





**Southern Association of Student Financial Aid Administrators**

**Sarah Baumhoff / Treasurer**

**Executive Board Report / August 2021**

**Committee Members** – n/a

**Committee Goals for 2021-2022:**

- Ensure all documents for SASFAA are updated and reflect the changes to hiring of a Bookkeeper.
- Work with Jeff Dennis to ensure a smooth transition and that he has what he needs to be successful.
- Ensure that the Bookkeeper role is successful and an asset to the organization.

**LRP and GAP Goal Activity to date:** n/a

**Motion/ Action Item(s):** n/a

**Policy & Procedure: Changes/ Recommendations:** n/a

**Activity Summary:**

I have been working with outgoing treasurer, Leah Louallen, Budget and Finance Chair, Marian Dill and Bookkeeper Jeff Dennis to ensure SASFAA's financial plan is sound and that we are maximizing our use of the Bookkeeper role.



**Southern Association of Student Financial Aid Administrators**

**Marian Dill / Budget and Finance Chair**

**Executive Board Report / August 2021**

**Committee Members**

- Sarah Baumhoff (GA), Kennesaw State University
- Amy Berrier (NC), University of North Carolina – Greensboro
- Kathy Bialk (KY), University of Kentucky
- Heather Boutell (TN), Vanderbilt University
- Katie Conrad (FL), Florida International University

**Committee Goals for 2021-2022:**

- Conduct the 1<sup>st</sup> quarter review for a new treasurer / bookkeeper
- Assist president in preparing and monitoring zero-based budget
- Assist with the external audit which was approved by the 20-21 Board
- Assist the president and treasurer with financial oversight

**LRP and GAP Goal Activity to date:**

**Allocation of Assets**

Operating Funds (15-25% target) Bank Accounts -	\$173,975.15	Currently 17.8%
Short Term (30-45% target) – Advisory Solutions	\$446,560.43	Currently 45.08%
Long Term (30-45% target) – Charles Schwab	\$351,458.66	Currently 36.05%

Fund allocation currently meet the established guidelines. Based on the existing market conditions and current limited cash flows needs, no funds will be transferred at this time.

**Discretionary Funds**

Current Assets (including bank accounts) -	\$974,817
Prior Year Budget	\$302,300
Outstanding Contractual Agreements	<u>\$103,609</u>
	\$568,908
20% maximum transfer from assets	\$113,781

The balance sheet as of June 30, 2021 is provided below.

**Balance Sheet**  
As of June 30, 2021

	<b>TOTAL</b>
▼ ASSETS	
▼ Current Assets	
▼ Bank Accounts	
2 BB&T Checking-ACH Only	100.00
BB&T Checking	125,962.79
BB&T Savings	47,912.36
Edward Jones-Money Market	2,822.82
<b>Total Bank Accounts</b>	<b>\$176,797.97</b>
▼ Other Current Assets	
Advisory Solutions 20/80 @ Edward Jones	446,560.43
Charles Schwab (NASFAA)	351,458.66
<b>Total Other Current Assets</b>	<b>\$798,019.09</b>
<b>Total Current Assets</b>	<b>\$974,817.06</b>
<b>TOTAL ASSETS</b>	<b>\$974,817.06</b>
▼ LIABILITIES AND EQUITY	
Liabilities	
<b>Total Liabilities</b>	
▼ Equity	
Opening Balance Equity	757,980.87
Retained Earnings	131,513.62
Net Income	85,322.57
<b>Total Equity</b>	<b>\$974,817.06</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$974,817.06</b>

Accrual basis Wednesday, August 4, 2021 08:48 AM GMT-04:00

**Motion/ Action Item(s):**

2021-22 Operating Budget

In accordance with requirements from Edward Jones, the board affirms the 2021-22 officers (B&F committee chair and bookkeeper) are:

- President - Celena Tulloss
- Treasurer – Sarah Baumhoff
- Budget and Finance Chair – Marian Dill
- Bookkeeper – Jeff Dennis

**Policy & Procedure: Changes/ Recommendations:**

None at this time

### Activity Summary:

- Thank you to Zachary Christian for facilitating the SASFAA DropBox. Financial records dating back to 2015-16 have been scanned and stored. This will increase transparency as multiple SASFAA members have quick and easy access to these records. This will also reduce the cost of transporting and storing hard-copy records from one location to another.
- Monthly reconciliation reports and expense approvals have been received from the treasurer and reviewed.
- Assist the president and treasurer with financial oversight
  - Assisted with the 2020-21 year-end close out. This will be submitted /added to the website
  - Past Treasurer validated the closing of credit card close outs for carriers who rolled off the board. Current Treasurer validated the closing of the past treasurer's credit card
  - Prepared a zero-based budget to present at August meeting
  - Reviewed and documented discretionary reserves
- Reviewed allocation of assets on a periodic basis as required by the GFM
- Monthly expense reports will be scheduled on the 20<sup>th</sup> of each month. Board members should receive this information throughout the fiscal year (once the budget is approved).
- Thank you to Leah Louallen (Past Treasurer) for assisting in training and transition of financial records.

### Outstanding Contractual Obligations:

#### **Embassy Suites Nashville Airport – August Board Meeting, August 7-8, 2021**

- Room rate is \$159 plus 15.25% plus \$2.50
  - 40 contracted room nights
  - \$65,000 F&B minimum
  - Attrition at 70%
  - Hilton Points for president

**Total liability: 7,966.60**

#### **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 Wi-Fi 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 off spa services for all attendees

- \$3.00 discount off self-parking
- Cut-Off date is January 25, 2022

**Total liability until August 3, 2021: \$95,642**

**Total liability: \$103,608.60**

Budget vs. Actuals: 2020-2021 Approved Budget - FY21 P&L				
July 2020 - June 2021				
	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
+ Income				
01 Membership Dues	47,355.00	30,205.00	17,150.00	156.78 %
02 Professional Development Income	24,136.49	51,750.00	-27,613.51	46.64 %
03 Annual Meeting	42,225.00	46,112.00	-3,887.00	91.57 %
04 Sponsorship	30,500.00	80,000.00	-49,500.00	38.13 %
07 Interest Earned	9.66		9.66	
08 Miscellaneous Income	613.00		613.00	
09 Transfer from Assets		79,233.00	-79,233.00	
11 Dividends Earned	21,258.57	15,000.00	6,258.57	141.72 %
12 Capital Gains/Losses	1,861.16		1,861.16	
<b>Total Income</b>	<b>\$167,958.88</b>	<b>\$302,300.00</b>	<b>\$ -134,341.12</b>	<b>55.56 %</b>
<b>GROSS PROFIT</b>	<b>\$167,958.88</b>	<b>\$302,300.00</b>	<b>\$ -134,341.12</b>	<b>55.56 %</b>
- Expenses				
101 President	2,242.44	9,200.00	-6,957.56	24.37 %
102 President-Elect	2,171.95	8,300.00	-6,128.07	26.17 %
103 Vice President	622.47	2,500.00	-1,877.53	24.90 %
104 Secretary	21.06	2,600.00	-2,578.94	0.81 %
105 Treasurer	2,988.39	3,200.00	-211.61	93.39 %
106 Past President	498.21	4,925.00	-4,426.79	10.12 %
107 Treasurer-Elect	1,224.58	5,375.00	-4,150.42	22.78 %
201 Membership		2,500.00	-2,500.00	
202 Electronic Services	2,230.73	7,400.00	-5,169.27	30.15 %
203 Professional Development Expense	5,016.75	62,500.00	-57,483.25	8.03 %
204 Communications & Outreach	809.81	2,600.00	-1,790.19	31.15 %
205 Budget and Finance	831.66	4,500.00	-3,668.34	18.48 %
206 Annual Meeting Program	5,650.29	100,000.00	-94,349.71	5.65 %
207 Site Selection	1,753.40	2,500.00	-746.60	70.14 %
210 Executive Board	29,826.61	45,000.00	-15,173.39	66.28 %
211 President's Contingency	1,500.00	2,000.00	-500.00	75.00 %
213 Advanced Program Planning		500.00	-500.00	
214 Global Issues	417.80		417.80	
216 Legislative Relations	332.56	2,500.00	-2,167.44	13.30 %
217 Long Range Planning & GAP	907.94	5,000.00	-4,092.06	18.16 %
218 Vendor/Sponsor	2,954.47	3,500.00	-545.53	84.41 %
219 Special Projects	1,371.31	2,500.00	-1,128.69	54.85 %
224 Accounting & Legal Fees	12,329.47	11,000.00	1,329.47	112.09 %
225 Online Payment Processing Fees	3,553.92	6,500.00	-2,946.08	54.68 %
228 Inter-State Travel		2,700.00	-2,700.00	
229 Awards	770.51	3,000.00	-2,229.49	25.68 %
231 Insurance	2,610.00		2,610.00	
<b>Total Expenses</b>	<b>\$82,636.31</b>	<b>\$302,300.00</b>	<b>\$ -219,663.69</b>	<b>27.34 %</b>
<b>NET OPERATING INCOME</b>	<b>\$85,322.57</b>	<b>\$0.00</b>	<b>\$85,322.57</b>	<b>0.00%</b>
<b>NET INCOME</b>	<b>\$85,322.57</b>	<b>\$0.00</b>	<b>\$85,322.57</b>	<b>0.00%</b>



**Southern Association of Student Financial Aid Administrators**

**Felicia Ailster and Melissa Smith / Conference**

**Executive Board Report / August 2021**

**Committee Members**

Stephanie Miller – Central Alabama Community College (AL)  
Jessica Alston – Georgia Piedmont Technical College (GA)  
Sarah Kauffman – Lincoln Memorial University (TN)  
Rob Zelaya – TCSG (GA)  
Alicia Keaton – University of Central Florida (FL)  
Seia Pleasant-Doine – Flagler College (FL)  
Traci Singleton – Citadel (SC)  
Keshia Woodus – Norfolk State University (VA)  
Nicole Patrick – College for Women (MS)  
Kimberly Morris – Higher Ed Consulting (GA)  
Kendra Myers-Simmons – Surry University (NC)  
Jo Wallace – TSAC (TN)

**Committee Goals for 2020-2021:**

- Plan the SASFAA annual conference, including coordinating the selection of presenters, moderators, speakers, and special guests, setting the conference agenda and scheduling entertainment/special activities.
- Work closely with the hotel staff and the conference committee to ensure our conference needs are met and stay within our budget.

**LRP and GAP Goal Activity to date:**

n/a

**Motion/ Action Item(s):**

n/a

**Policy & Procedure: Changes/ Recommendations:**

n/a

**Activity Summary:**

- Met with the hotel staff to review contract and addendum.
- Held first virtual conference committee meeting to explain expectations for meetings, assignments, and communications.
- Started working with a SASFAA member on conference logo for the theme.
- Communicated with federal presenters and formally invited them to attend.
- Initiated the request for the opening session speaker.
- Planning the on-site meeting with the hotel in October.
- Sending out email to SASFAA members asking for session topics and their ability to attend.



**Southern Association of Student Financial Aid Administrators**

**Dr. Stephanie Watson / Sponsorship**

**Executive Board Report / August 2021**

**Committee Members**

Shannon Jones  
Felicia Ailster  
Melissa Smith

**Committee Goals for 2021-2022:**

Secure \$50,000 in sponsorship for the 21-22 SASFAA Conference

**LRP and GAP Goal Activity to date:**

**Motion/ Action Item(s):**

**Policy & Procedure: Changes/ Recommendations:**

**Activity Summary:**

Worked with Shannon Jones to communicate with 20-21 sponsors:

- Responses: 17 out of 132 (representative of a good number of possible vendors):
- Will you attend – Yes = 11, No = 1, Maybe = 5
- Could that change – 50% 50% chance that the 5 could change.
- Will you know more by November – 4 out of 5 said yes

**Specific notes on what vendors would like to see offered as new – continued – etc:**

- ✓ Thought leadership session
- ✓ Exhibit booth highly visible
- ✓ Badge scanning
- ✓ Pre and post attendee lists
- ✓ Comped registration
- ✓ Moderate
- ✓ 60 second to 2-minute overview of company before General Session or some other visible time – perhaps lunch.
- ✓ Speed sessions (We've done this in the past like speed dating – leave a vacant seat at each table...set a 60 second (or whatever) timer – then swap seats to the next table and tell those folks about your products, services.) It's pretty fun.

- ✓ Game to encourage traffic
- ✓ Robust Agenda
- ✓ Possibility of submitting session ideas for consideration for a concurrent session – not product related.
- ✓ Commercial or rolling screen with ads
- ✓ 2019 Pricing with more options from the virtual options included
- ✓ Interactive conference
- ✓ All inclusive – don't want to have to pay for a Lunch and Learn to have a session.

Met with President, Conference Chair, and Budget & Finance Chair to discuss sponsorship options and annual budget.

Agreed on 3 initial levels of sponsorship for 21-22: Tier 1 \$3500, Tier 2 \$2500, and Tier 3 \$1500

Developed an Excel spreadsheet to compare sponsorship options and tiers between 19-20 and 20-21 and sent it to the committee members for feedback.





**Southern Association of Student Financial Aid Administrators  
April Tretter / Communications and Outreach Committee Chair  
Executive Board Report / August 2021**

**Committee Members**

**Committee Goals for 2020-2021:**

**LRP and GAP Goal Activity to date:**

**Motion/ Action Item(s):**

**Policy & Procedure: Changes/ Recommendations:**

**Activity Summary:**



**Southern Association of Student Financial Aid Administrators**

**Daniel Barkowitz / Electronic Services**

**Executive Board Report / August 2021**

**Committee Members**

Daniel T. Barkowitz, Chair  
Jonah Miller  
Zachary Christian

**Committee Goals for 2020-2021:**

- Support all aspects of SASFAA's website
  - Webinars
  - Website changes
  - Event registration
  - Conference registration
- Support conference and other in person events
  - Laptops and projectors
  - On site a/v liaison
- Support online events
  - Webinar moderator

**LRP and GAP Goal Activity to date:**

None

**Motion/ Action Item(s):**

- Webinar package discussion
  - GoToWebinar
  - Zoom

**Policy & Procedure: Changes/ Recommendations:**

**Activity Summary:**



**Southern Association of Student Financial Aid Administrators**

**Wayne Kruger / Legislative Relations Committee**

**Executive Board Report / August 2021**

**Committee Members:**

Chair: Wayne Kruger

Florida Rep: Kris Hatcher

Georgia Rep:

North Carolina Rep:

South Carolina Rep: Adam Ghiloni

Virginia Rep:

Mississippi Rep:

Alabama Rep: Stephanie Miller

Kentucky Rep: Theresa Lowder

Tennessee Rep: Ron Gambill

**Committee Goals:**

1. Hold monthly meetings with the committee
2. Continue to refine and produce a SASFAA one-page legislative priorities sheet and revise the Legislative Guide
3. Continue to update the membership on Legislative Activities
4. Coordinate and share state legislative information
5. Plan a small in person hill visit for spring 2022 if allowed
6. Have a legislative information webinar and/or conference session

**LRP and GAP Goal Activity to date:**

(listing below all the LRP/GAP Goals and will indicate when activity took place.

**GOAL:** Educate membership on legislative advocacy.

**OBJECTIVES:**

1. Update and republish the SASFAA Legislative Guide.
2. Provide on-going legislative advocacy training to the membership.

**GOAL:** Provide opportunities for legislative advocacy.

**OBJECTIVES:**

1. Ensure the Legislative Relations Committee keeps the membership apprised of impending legislation and regulation.
2. Where appropriate and where consensus exists, provide the membership with appropriate analysis of legislation and regulations.

**GOAL:** SASFAA should be an influencer in the legislative and regulatory process.

**OBJECTIVES:**

1. Where appropriate and where consensus exists, write letters or emails to the appropriate agency.
2. Inform the membership of any action taken by the Board and encourage membership participation in the advocacy process.

**GOAL:** Provide for Congressional visits when needed and included in the budget.

**OBJECTIVES:**

1. Congressional visits shall be for information purposes and not lobbying.
2. The President in consultation with the Budget and Finance Chair should determine if funds are available to underwrite the cost of Congressional visits when determined to be needed.
3. Congressional visits are not required each year. External factors, such as travel restrictions and the availability to meet with legislative staff, should be considered in determining the need.
4. The President in consultation with the Legislative Relations Chair should determine the SASFAA representatives to participate in Congressional visits.
5. The Legislative Relations Chair should coordinate Congressional visits with assistance from the Site Selection Chair for travel and accommodations.

**Motion / Action Item(s):**

None at this time

**Policy & Procedure: Changes / Recommendations**

None at this time

**Activity Summary:**

Solicit member representation from all states, will coordinate first meeting for mid-late August. Continued to have the NCHER Weekly rundown sent out.



**Southern Association of Student Financial Aid Administrators**

**Zachary Christian / Membership Chair**

**Executive Board Report / August 2021**

**Committee Members:**

To be determined.

**Committee Goals:** Continue to maintain the Membership database; create a how-to document to leave for future Membership Chairs in regard to account merging and how to perform basic maintenance on Membership database within Wild Apricot to ensure clean and concise data; Maintain Membership tracking documentation to monitor membership trends; work to increase membership to at least a pre-COVID-19

**LRP and GAP Goal Activity to date:**

**Motion/ Action Item(s):**

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

**Activity Summary:** Fixed the issue within Wild Apricot that caused auto-renewal of 2020-2021 Members before the start of the Membership year (July 15); began cleaning up membership database – using “State Old” to update “State New” to allow for consistency within the membership database.

**2021-2022 Membership Data (As of July 30, 2021):**

	<b><u>2020-2021</u></b>	<b><u>2021-2022</u></b>	<b><u>%Change</u></b>	<b><u>Number Change</u></b>
Active	1166	525	-54.97%	-641
Associate	16	5	-68.75%	-11
Honorary	17	18	5.88%	1
Retired	1	0	-100.00%	-1
<b>Total</b>	<b>1200</b>	<b>548</b>	<b>-54.33%</b>	<b>-652</b>
Alabama	99	45	-54.55%	-54
Florida	169	57	-66.27%	-112
Georgia	190	66	-65.26%	-124
Kentucky	79	36	-54.43%	-43
Mississippi	61	28	-54.10%	-33
North Carolina	122	69	-43.44%	-53
South Carolina	171	78	-54.39%	-93
Tennessee	137	75	-45.26%	-62

Virginia	114	63	-44.74%	-51
Other	58	31	-46.55%	-27
<b>Total</b>	<b>1200</b>	<b>548</b>	<b>-54.33%</b>	<b>-652</b>
	<b><u>2020-2021</u></b>	<b><u>2021-2022</u></b>	<b><u>%Change</u></b>	<b><u>Number Change</u></b>
Public (4 Year)	359	154	-57.10%	-205
Private non-profit (4 Year)	334	149	-55.39%	-185
Public (2 Year)	279	139	-50.18%	-140
other	50	19	-62.00%	-31
Graduate/Professional	31	10	-67.74%	-21
Government Agency	12	8	-33.33%	-4
Lender	33	18	-45.45%	-15
Consultant	20	11	-45.00%	-9
Guaranty Agency	14	5	-64.29%	-9
Servicer	11	5	-54.55%	-6
Private non-profit (2 Year)	9	7	-22.22%	-2
Not Specified	11	8	-27.27%	-3
Private for profit (Business School)	12	1	-91.67%	-11
Private for profit (Technical/Trade)	20	10	-50.00%	-10
Secondary Market	2	1	-50.00%	-1
Retired Financial Aid Professional	3	3	0.00%	0
Health Related/Nursing	0	0	#DIV/0!	0
<b>Total</b>	<b>1200</b>	<b>548</b>	<b>-54.33%</b>	<b>-652</b>
Male	266	126	-52.63%	-140
Female	882	394	-55.33%	-488
Not Specified	52	28	-46.15%	-24
<b>Total</b>	<b>1200</b>	<b>548</b>	<b>-54.33%</b>	<b>-652</b>
White/Caucasian	718	351	-51.11%	-367
Black/African American	296	122	-58.78%	-174
Not Specified	117	50	-57.26%	-67
Hispanic/Chicano/Mexican American	46	16	-65.22%	-30
Asian/Pacific Islander/Filipino	19	8	-57.89%	-11
Native American	4	1	-75.00%	-3
<b>Total</b>	<b>1200</b>	<b>548</b>	<b>-54.33%</b>	<b>-652</b>
As of date:	6/8/2021	7/30/2021		



**Southern Association of Student Financial Aid Administrators**

**Joan Bailey / Site Selection Chair**

**Executive Board Report / August 2021**

**Committee Members** (Incomplete)

FL – Irma Molinares  
GA – Tarik Boyd  
AL – Stephanie Miller

**Committee Goals for 2020-2021:**

- Ensure timely communication of pertinent travel related and site information to board members/committee chairs with responsibilities for hosting events, as well as provide travel related site information to the entire board for meetings etc.
- Coordinate with the President/Vice President/Conference Chairs/President Elect to solicit proposals for trainings and events as well as be the bridge with hotel staff and SASFAA, representing the association as the point of contact for all meetings and events.
- Coordinate with site location staff to ensure SASFAA funds are managed in a fiduciary and responsible manner.
- Submit rooming list meal selection etc. in a timely manner to ensure SASFAA is meets all required deadlines.
- Negotiate/renegotiate and secure contracts for locations to host SASFAA meetings and events. These include but isn't limited to:
  - Fall training event
  - Annual conference
  - Board meetings
  - Transition meetings
  - Conference 2023 location
  - Transition 2022 location

**SASFAA LRP and GAP Goal Activity to date:**

- Secure proposal for fall training management institute (will be presented for a approval)
- Secure and finalize location for first in person board meeting – Nashville Tennessee
- In negotiation process with 2021 conference hotel for site visit.

**Motion/ Action Item(s):**

Vote on one of the sites proposed for the fall management institute training.

**Policy & Procedure: Changes/ Recommendations:** NONE

**Activity Summary:**



**Southern Association of Student Financial Aid Administrators**

**Jacquelyn LeSueur / Global Issues Chair**

**Executive Board Report / August 2021**

**Committee Members**

**Committee Goals:**

1. Obtain approval from the Board to change the name of the Global Issues Committee to **Equity, Inclusion, and Global Issues Committee** for the 2021-2022 year.
2. Obtain active representation from each state on the Global Issues Committee
3. Ensure that training opportunities provided are inclusive to all who we serve in SASFAA.
4. To have a successful year one of the SASFAA Diversity Leadership Program
5. To provide SASFAA communication outlets with articles or relevant information as it pertains to diversity, inclusion, and equity. This will occur monthly and will begin in August 2021.
6. Provide session topics for the annual conference, workshops, or trainings that focus on current global issues and diversity.

**LRP and GAP Goal Activity to date:**

**Motion/ Action Item(s):**

**Change the name of the Global Issues Committee to Equity, Inclusion, and Global Issues Committee**

**Policy & Procedure: Changes/ Recommendations:**

**Activity Summary:**





**Southern Association of Student Financial Aid Administrators**

Dr. James Theeuwes / Alabama President

Executive Board Report / August 2021

**Committee Members**

**Committee Goals:**

**LRP and GAP Goal Activity to date:**

**Motion/ Action Item(s):**

**Policy & Procedure: Changes/ Recommendations:**

**Activity Summary:**

2021-22 conference is planned for October 2021. This is the first in person conference in two year. It is being held in Mobile at the Battle House. The dates are October 10-13. Conference days are the 11-12.



## Southern Association of Student Financial Aid Administrators

Katie Conrad / Florida President

Executive Board Report / August 2021

### Goals:

The newly developed 5 year [Strategic Plan](#) will guide our efforts, as we will strive to accomplish as many goals and objectives as possible in the coming year.

1. Increase membership and member engagement by promoting the distinctiveness and differentiation of FASFAA to various association stakeholders.
2. Offer professional development opportunities to meet FASFAA members' needs.
3. Develop the leadership pipeline and infrastructure to grow and support future and current leaders within FASFAA.
4. Advocate for and promote student aid and postsecondary education's values and benefits to stakeholders in various communities and contexts while keeping diversity, equity, and inclusion at the core of FASFAA's efforts.
5. Create an infrastructure for sound financial stewardship to provide ample funding to support FASFAA's ongoing mission to be a best-in-class not-for-profit educational corporation.

### Motion/ Action Item(s):

N/A

### Policy & Procedure: Changes/ Recommendations:

N/A

### Activity Summary:

The 2021-2022 FASFAA year got underway by conducting our first official board meeting on July 1, 2021. Our hope is to bring everyone "Back Together Again" with the **in person training events** listed below:

- Regional Workshops (5 regions – Fall and Spring workshops in each region)
- Clock Hour workshop in late October (tentatively set for Oct 25-27)
- New Aid and Intermediate Aid Officer workshop in late January
- Directors' Summit in early March
- FASFAA Annual Conference May 31-June 3 in Ponte Vedra.

This fall, FASFAA will partner with Florida College Access Network (FCAN) and Florida Office of Student Financial Assistance (OSFA) to offer two virtual **High School Counselor workshops** in September. We will cover

the FAFSA basics and spend time delving into the difficult topics of unique family situations, professional judgments, and how to support our students who are ineligible for federal aid.

FASFAA will again be offering the virtual **LEAP program** for a select group of aspiring leaders in our association. This program will launch in September and will hold monthly meetings via Zoom. Participants and mentors will also meet for a workshop in person the day before the annual conference.

FASFAA will offer a monthly webinar series, with the first to be held on August 4<sup>th</sup>. During this webinar we will be joined by David Levari, a Postdoctoral Research Associate at Harvard Business School, who will discuss his “Prevalence-Induced Concept Change in Human Judgment” research. After Dr. Levari’s presentation, we will be joined by a panel of our colleagues to discuss the changes to verification, and how we can use this opportunity to remove barriers.

- FASFAA currently has 561 paid members for 2021-2022. Our membership grows throughout the year since our annual conference (which includes membership for the following year) is held in late May. Last year we ended with over 900 members.



**Southern Association of Student Financial Aid Administrators**

**Angela Tate / Georgia President**

**Executive Board Report / August 2021**

**Committee Members**

Maria Hammett: Past President- Mercer University  
David McMillion: President Elect- University of North Georgia  
Wilmani Humphries: Vice President of Professional Development- University of West Georgia  
Samantha Hutto: Secretary- Georgia Southern University  
Dustin McDaniel: Treasurer- Technical College System of Georgia  
Emmilee Mitchell: Treasurer Elect- Mercer University  
Courtney Ray: Program Chair- Lanier Technical College  
Pennie Strong: Budget & Finance- Georgia Student Finance Commission  
Malika Amlett: Diversity & Community Action Chair- Atlanta Technical College  
Jessica Alston: Business Partner Chair- Georgia Piedmont Technical College  
Joe Buchholz: Legislative Affairs Chair- Georgia Gwinnett College  
Karli Greenfield: Membership Chair- Truett McConnell University  
Melodie Pirone: Technology Chair- Southern Crescent Technical College  
Aria Simmons: Leadership & Mentorship- Georgia State University

**Committee Goals for 2021-2022:**

- Provide training that address the needs of all institutions.
- Encourage opportunities for networking which we hope will lead to members becoming resources for each other
- Develop and inspire leaders to invest their time, talent, and skills within GASFAA.

**SASFAA LRP and GAP Goal Activity to date:**

None

**Motion/ Action Item(s):**

None

**Policy & Procedure: Changes/ Recommendations:**

None

**Activity Summary:**

The GASFAA Transitional Board meeting was held on July 20<sup>th</sup> and 21<sup>st</sup>. The planning of the Fall Training, Winter Workshop, and Conference are underway with the anticipated timeframes being October, March, and June.



**Southern Association of Student Financial Aid Administrators**

**Rhonda Bryant / Kentucky President**

**Executive Board Report / August 2021**

**Committee Members**

None

**Committee Goals for 2021-2022:**

Increase membership in SASFAA  
Provide funding to facilitate increased participation in the New Aid Officer's Workshop  
Share relevant information with SASFAA colleagues.

**LRP and GAP Goal Activity to date:**

Provided KASFAA conference dates to be included on SASFAA's calendar.

**Motion/ Action Item(s):**

**Policy & Procedure: Changes/ Recommendations:**

**Activity Summary:**

First board meeting for the 21-22 year was held July 23 in Louisville, KY. All positions reported their goals for the upcoming year. Most activity centered around communications with committee members and assigning duties.

Planning for the fall conference is on-going as we work toward the first in-person conference in two years.

Read SASFAA By-laws, P&P and Long-Range Plan.



**Southern Association of Student Financial Aid Administrators**

**Megan Smith / Mississippi President**

**Executive Board Report / August 2021**

**Committee Members**

N/A

**Committee Goals for 2021-2022:**

My personal goal was to invite new people who have never served on the board to volunteer. In doing so, we are increasing participation from groups who are not always represented and encouraging more people to get involved and understand MASFAA thus leading to an opportunity to serve in other board/exec board positions. Our overarching goal is to develop ways to connect and increase membership by increasing consistent communication and outreach to institutions. Within this task, we have identified several ways to accomplish this goal.

- Contact each institution individually at least once before fall training.
- Develop a Q&A listserv within the website -identify different subgroups to utilize.
- Create a newsletter that highlights various happenings within MASFAA, SASFAA, and other associations that would benefit members; recognize members for accomplishments (professionally and personally); introduce various diversity and inclusions topics.
- Increase social media presence (Facebook and LinkedIn and possible Twitter and Instagram) and fully-utilize the website's capabilities.

**SASFAA LRP and GAP Goal Activity to date:**

N/A

**Motion/ Action Item(s):**

N/A

**Policy & Procedure: Changes/ Recommendations:**

N/A

**Activity Summary:**

- The theme this year is "Celebration." We want to host a celebration throughout the year to recognize our members and MASFAA.
- We held our transitional board meeting on July 28-29<sup>th</sup>. Board members are very excited and eager to begin serving and planning for the year.
  - Approved budget
  - Discussed upcoming fall training opportunities (October) and submitted dates to request a federal presenter
  - Developed goals for the year and identified ways to collaborate with other offices

**Policy & Procedure: Changes/ Recommendations:**

**Activity Summary:**



**Southern Association of Student Financial Aid Administrators**

**Zilma Lopes / North Carolina President**

**Executive Board Report / August 2021**

**Committee Members:** N/A

**Committee Goals for 2021-2022:**

1. Gain an understanding of my role and the SASFAA association and operations.
2. Contribute in any capacity to the President's visions & goals and SASFAA's LRP & GAP goals.
3. Ensure that North Carolina is appropriately represented in all SASFAA matters to include increasing our membership in the association.
4. Collaborate with other State Presidents to continue to foster great partnerships and relationships among the region.

**LRP and GAP Goal Activity to date:** n/a

**Motion/ Action Item(s):** n/a

**Policy & Procedure: Changes/ Recommendations:** n/a

**Activity Summary:**

- Held 1st official board meeting, which was a successful meeting to include:
  - Set association goals & vision for 21/22 year
  - Board voted to offer an in-person conference for the upcoming Fall conference
    - **Location:** Wilmington Riverfront:
    - **Dates:** Sunday, November 6<sup>th</sup> to Wednesday, November 10<sup>th</sup>, 2021
- Started working with committees & board officers on goals for their roles.
- Working on establishing 21/22 budget & financial stability of the association (*met with investment banker*)

Established subcommittees for various tasks & projects to include a ***Strategic Long-Range Committee*** & a ***Scholarship Committee***



**Southern Association of Student Financial Aid Administrators**

Carolyn Sparks-SCASFAA President

Executive Board Report/August 2021

**Committee Members**

- Not applicable

**Committee Goals for 2021-2022:**

- To further advance the mission and reputation of SCASFAA by providing professional development opportunities, advocacy opportunities and networking opportunities for the membership.
- To observe and learn functions of other state associations to better equip SCASFAA in its mission.

**SASFAA LRP and GAP Goal Activity to date:**

- Not applicable

**Motion/ Action Item(s):**

- None currently

**Policy & Procedure: Changes/ Recommendations:**

- None currently

**Activity Summary:**

- June 6-8, 2021: Attended 2021-2022 SCASFAA Transition Board meeting held in Myrtle Beach at the Embassy Suites Oceanfront
- June 19-22, 2021: Attended SASFAA Transition Board meeting held in Orlando at the Embassy Suites Lake Buena Vista South
- July 1, 2021: Registration for SCASFAA's Annual Conference (October 17-20, 2021) opened to the membership.
- July 20, 2021: SCASFAA Executive Board approved the 2021-2022 Budget.
- Plans are underway for our annual conference as well as other professional development opportunities throughout the year.

Respectfully submitted,

Carolyn Sparks  
July 22, 2021





## Southern Association of Student Financial Aid Administrators

Jeff Norrod / Tennessee President

Executive Board Report / August 2022

### **TASFAA Executive Board & Committee Members (V indicates voting members)**

- President – Jeff Norrod, Tennessee Technological University (V)
- Past-President – Danette Seale, Carson Newman University (V)
- President-Elect – Charles Harper, Belmont University (V)
- Secretary – Jo Wallace, Tennessee Student Assistance Corp (V)
- Treasurer – Haley Greenway, Tennessee Board of Regents (V)
- 2-Year Public Representative – Kacee Hardy, Dyersburg State Community College (V)
- 4 Year Public Sector Representative – April Wolford, University of Tennessee(V)
- 4-Year Private Sector Representative – Regina Gilbert, Lipscomb University
- Proprietary Sector Representative –Randy Cotterell, Mind Body Institute, LLC (V)
- TCAT Representative – Mark Voeltzke, TCAT Nashville (V)
- Member At Large – Jonathan Looney, SallieMar (V)
- Association Governance Chair – Jeff Gerkin, University of Tennessee Knoxville
- Awards Chair – Joe Myers, Motlow State Community College
- Budget & Finance Chair – Melissa Smith, Vanderbilt University
- Conference Chair – Ashley Edens, Tusculum University
- Diversity Chair – Eric Farmer, TN Student Assistance Corporation
- Electronic Services Chair – Laura Harkelroad, University of Tennessee
- Governmental Relations Chair – Ron Gambill, Edsouth
- Historical Chair – Kacee Hardy, Dyersburg State Community College
- Membership Chair – Lacey Weese, TN Wesleyan University
- Public Relations/Blog Chair – Tori Watson, EdAmerica
- Site Selection Chair – Leah Louallen, TN Student Assistance Corporation
- Sponsorship Chair – Tina Rich, Carson Newman University
- State Programs Chair – Jason Seay, TN Student Assistance Corporation
- Training Chair – Dick Smelser, Pellissippi State Community College

### **Committee Goals for 2021-2022:**

- Ensure that TASFAA is represented at all SASFAA Board meetings
- Encourage TAFSAA members to join SASFAA, if not already a member
- Encourage TASFAA participation in SASFAA events
- Appoint a Committee to review, update, and file a new three year Strategic Plan for the period July 2021 – June 2024 for consideration
- TASFAA President-Elect will participate in the SASFAA Presidents' exchange
- Offer Fall training across the State's three regions

- Consider alternatives if necessary
- Offer pre-conference events at the TASFAA annual conference
- Continue to build TASFAA membership
- Keep membership and conferences costs as low as possible
- Work with TASFAA Governmental Relations on State Hill visits

**LRP and GAP Goal Activity to date:**

N/A

**Motion/ Action Item(s):**

N/A

**Policy & Procedure: Changes/ Recommendations:**

N/A

**Activity Summary:**

- Past-President Danette Seale attended the SASFAA State Presidents' and Transition Board Meeting June 2021 in Orlando, FL
- The TASFAA Transition and Executive Board meeting was held July 15-16, 2021 at the Cool Springs Marriott in Franklin, TN.
  - Transition was held on the first day
  - Executive Board Meeting was held the second day

The TASFAA Annual Conference is scheduled for April 10-13, 2021 at Cool Springs Marriott, Franklin, TN



**Southern Association of Student Financial Aid Administrators**

**Beth Armstrong / Virginia President**

**Executive Board Report / August 2021**

**Committee Members:**

**Committee Goals for 2020-2021:**

**LRP and GAP Goal Activity to date:**

**Motion/ Action Item(s):**

**Policy & Procedure: Changes/ Recommendations:**

**Activity Summary:**



**Southern Association of Student Financial Aid Administrators**

**Sandy Neel / Special Project – Association Governance**

**Executive Board Report / August 2021**

**Committee Members**

Yet to be determined

**Committee Goals for 2020-2021:**

This year is to establish who should be on the Association Governance committee and what it should do. Once that is established, make Policies and Procedures updates to reflect the new way of doing business.

**SASFAA LRP and GAP Goal Activity to date:**

**Motion/ Action Item(s):**

**Policy & Procedure: Changes/ Recommendations:**

**Activity Summary:**



**Southern Association of Student Financial Aid Administrators**

**Shannon Jones/Special Project – Partner Advisory Board**

**Executive Board Report / August 2021**

**Committee Members:**

Stephanie Watson – Vendor Sponsor Chair

Kathleen Donahue - Ocelot

**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 2022.

**SASFAA 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 through email and a google poll. The intent was to get their suggestions, thoughts and feedback on options for the 2022 conference.
- This Business Partner directory on the SASFAA website will continue to be promoted, updated and improved upon on a regular basis.

**Motion/ Action Item(s):**

None

**Policy & Procedure: Changes/ Recommendations:**

None

**Activity Summary:**

1. Met with Stephanie Watson to get each of us up to speed on where we were and needed to be to move forward with 2022.
2. Having continued conversations about the options for the vendors: what features to offer, costs, etc.
3. Conducted Google Poll with vendors.
4. Updated the Business Partner contact information sheet to make sure we have the most up to date contact info for all contacts.