

Southern Association  
of Student Financial  
Aid Administrators  
February 2021



Agenda and  
Board Reports

Prepared by Secretary Sarah Dowd

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**Southern Association of Student Financial Aid Administrators**

**Celena Tulloss/President**

**Executive Board Report/February 2021**

**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 FAAs 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:**

Conference Planning –

- Zoom meetings have been held with the conference committee, conference co-chairs, and Sponsorship chair in preparation for the 2021 virtual conference
- In lieu of the President Elects Workshop, a “Meet and Greet” will be held for the 9 state President-Elects.

Professional Development-

- The first SASFAA Director’s Summit will be announced during the conference and will be held March 30-31, 2021, facilitated by Zita Barree (VA), Michael Morgan (TN), Michael Bennett (FL), Kathy Bialk (KY) and Beth Armstrong (VA)

NASFAA –

- Attended NASFAA Board Meeting November 16-17, 2020 via Zoom
- Attended NASFAA Board Call: Briefing on Congressional year-end spending and Stimulus bills January 7, 2021 via Zoom

State Conferences-

- Celena will provide the SASFAA update at the spring NCASFAA conference



**Southern Association of Student Financial Aid Administrators**

**President-Elect**

**February 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**

**Bill Spiers/Past President**

**Executive Board Report/February 2021**

**Nominations and Awards Committee Members**

Steve Smith	Alabama
Daniel Barkowitz	Florida (Wayne Kruger replace him on Nominations)
Lakisha Sanders	Georgia
Bob Fultz	Kentucky
Gail Beggs	Mississippi
Rachel Cavanaugh	North Carolina (Replacement for Robert Muhammad)
Melanie Gillespie	South Carolina
Joe Myers	Tennessee
Brad Scaggs	Virginia

**Committee Goals for 2020-2021:**

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

- Nominations solicited from the membership for all open Board positions
- Nominations solicited from the membership for Awards
- Membership notified of those nominated for positions
- Membership nominations for award approved by the Board
- NASFAA Regional Leadership position approved by the Board

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

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

**Activity Summary:**

The Past Presidents have been bust with nominations and awards. Right now, the election is up for the membership to begin voting. All nominations for awards were reviewed, and all candidates met the qualification for the award for which they were recommended. Awards will either be mailed or delivered to the recipients. Awards to be presented this year are Honorary Membership and Distinguished Service

With the elections and awards behind us, as the SASFA Immediate Past President I will be working to provide the membership with our end of year report. As a reminder, it is important to get your LRP and other activities in to President Tullos as soon as possible.



**Southern Association of Student Financial Aid Administrators**

**Joan Bailey/Vice President**

**Executive Board Report/February 2021**

**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
- November 12, 2020 –Webinar; Leveraging Technology to Better Serve Your Students

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.



Planning for the following events has started. Registration information will be announced at the annual conference:

#### NAOW21

- Being led by Runan Evans
- Will be held in a virtual formation.
- Instructors will be from a slate of those that had volunteered for 2020
- Considering Zoom as the platform to be used
- Have group of participants based on years or service and group lead will be 2 instructors.
- Will not be using NASFAA Credential testing as a promotion, we will teach some materials but testing and cost of testing would be the responsibility of the participants
- Instead of Honorariums – gift cards will be given to Instructors etc.
- The proposed dates for NAOW are June 7-25, 2021
- Number of sessions are being determined and will guide the format and number of sessions per week
- SASFAA will honor prior NAOW scholarship recipients from 2020, as well as create an application process for the upcoming event
- Recommended fee - \$135 which include membership for 21/22, must be a current member to participate

#### Enrollment Management Forum

- Being led by Billie Jo Hamilton, Brent Tenner has agreed to be part of the planning committee
- Billie Jo is in the process of adding someone from a HBCU to the planning committee to add a different dimension
- Speakers will be invited to help with presentations after the topics etc. is decided on
- Proposed Fee - \$125, must be current SASFAA Member
- Propose dates – March to April, over a series or weeks since it will be in a virtual format.

Note that due to the virtual conference format there will not be pre conference sessions. The Enrollment Management Forum would have been a preconference event. Also due to the many virtual training activities, scheduling webinars have been a challenge as we do not want to overwhelm membership with multiple events, as states and national associations are also having to operate in a virtual format.



**Southern Association of Student Financial Aid Administrators**

**Sarah Dowd/Secretary**

**Executive Board Report/February 2021**

**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:**

- Assisted President as needed with communications and surveys
- Prepared board reports and agenda document for full board meeting



**Southern Association of Student Financial Aid Administrators**

**Leah Louallen/Treasurer**

**Executive Board Report/February 2021**

**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 for February 25-26, 2021 at Lee University.



**Southern Association of Student Financial Aid Administrators**

**Sarah Baumhoff/Treasurer-Elect**

**Executive Board Report/February 2021**

**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**

**February 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**

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

**February 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**

**Michael Birchett/Sponsorship Chair**

**Executive Board Report / February 2021**

**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):**

- N/A

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

- N/A

**Activity Summary:**

The Sponsorship Chair has been working to collect sponsorship income. Since our last meeting, the Sponsorship has secured \$30,000 in sponsorship income for the 2020-2021 year—20% above goal. He believes that the 2020-2021 goal was appropriate, given the estimated budget amount was incredibly close to actuals, and given the uncertainties of the pandemic and the effect of a completely virtual online conference.

The Sponsorship Chair has also been working to collect banner ads, print ads, commercials, and other items for use in the 2021 SASFAA Conference.

The Sponsorship Chair is currently working on finalizing a means to highlight sponsors in lieu of a typical physical sponsorship vending area.



**Southern Association of Student Financial Aid Administrators**  
**Jonah Miller and Zach Christian -- Electronic Services Committee Co-Chairs**  
**Executive Board Report / February 2021**

**Committee Members**

- Jonah Miller – Co-Chair
- Zachary Christian – Co-Chair
- Daniel Barkowitz, FL
- Chad Sartini, VA

**Committee Goals for 2020-2021:**

- Ensure the website stays accurate and up-to-date
- Ensure that SASFAA events are open to the membership and communicated in a timely manner
- Review current webpage for improvements / tweaks as needed (maybe reorganize a little)
- Provide training for other areas of the Executive Board on WA so they can be more self-sufficient

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

- LRP and GAP review in progress.

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

- N/A

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

- N/A at this time. Maybe later.

**Activity Summary:**

- Registration for conference open, and working smoothly
- All other membership is open now.
- Working on setting up the Conference Virtual Links and PowerPoint page for Conference Registrants
- Assisted with setting up ElectionBuddy for the 2021-22 Elections





**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 Erslan	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 listserv 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**

A) Legislative Activities

- 1) Consolidated Appropriations Act for Fiscal Year 2021
  - Sets the maximum PELL Grant at \$6495, an increase of \$150 over the 2020 enacted level.
  - Provides \$880 million for the FSEOG Program.
  - Provides \$1.2 billion for FWS.

- Allows FSA to extend the contract for existing student loan servicers for two additional years. (7 Servicers now)
  - Includes a modified version of the FAFSA Simplification Act.
  - Repeals the 150% cap on receipt of subsidized undergraduate student loans. SULA
  - Restores PELL Grant eligibility for individuals with a successful borrower to repayment claim.
  - Discharges existing loans borrowed under the HBCU Capital Financing Program.
- 2) Stop Student Debt Relief Scams Act was signed into law.
  - 3) The President directed the Department of Education to extend the pause on student loan payments and interest accrual on federally held FFELP and Direct Loans until at least 9-30-2021.
  - 4) President Biden moved loan forgiveness to Congress.
  - 5) Senate Majority Leader Schumer, Senator Warren and four House members are pushing a resolution to cancel up to \$50,000 of Federal student loan debt.
- B) SASFAA Conference Webinar  
There will be a Legislative Relations Webinar in association with the SASFAA Conference currently scheduled for February 22, 2021 at 9:15 am Eastern Time. James Bergeron will be the featured speaker. James served on the Hill as a staff member for 15 years and is the current President of the National Council of Higher Education Resources.
- C) Committee Activities for 2021  
Committee members were requested to poll their state for the critical items to be sought in the next Reauthorization of the Higher Education Act. FAFSA Simplification will be a reality, but outstanding issues like multiple and confusing repayment plans remain an issue. The committee should develop a unified message to take to Congress.
- D) Legislative Relations Committee Meetings Via Conference Call  
The first committee meeting was held via conference call January 15, 2021. The committee will continue to conduct meetings via conference call with future dates being established as February 12 and March 12.
- E) COVID-19 Legislation  
Discussion continues among House and Senate leadership trying to reach agreement. The range is \$1.2 - \$1.9 trillion with the President pushing for the \$1.9 trillion.
- F) Committee Appointments for Congress  
The House and Senate continue to fill committee seats and this process hopefully will be completed by the end of February.
- G) Nomination of Secretary of Education  
Dr. Miguel Cardona is President Biden's nomination. He easily cleared the Senate HELP Committee on February 3, 2021.
- H) Appointees for the Department of Education  
Numerous appointments have been made with additional appointments continuing. Listed below are a few:
- Deputy Assistant Secretary, OPE: Dr. Michelle Asha Cooper
  - Senior Counsel, Office of General Counsel: Joanna Darcus
  - Senior Counsel, Office of General Counsel: William Desmond
  - Chief of Staff, Office of the Under Secretary: Melanie Muenzer



**Southern Association of Student Financial Aid Administrators**

**Wayne Kruger / Membership Chair**

**Executive Board Report/February 2021**

**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:** Serve as the State of Florida Representative for the Legislative Affairs committee and attending those meetings and working with the Legislative Relations Chair. Serve on the Conference Committee and am assisting with the creating of the zoom links and will act as a technology assistance person running several sessions. Reviewing the membership database prior to the election to ensure that only those that should have access to a ballot and correcting any issue with the members information. Below and attached to the board report is a breakdown of our membership. In the attached is a 4-year comparison but listed below is a year over year to see the current impact of COVID.

**2020-2021 membership data:**

	<b><u>2019-2020</u></b>	<b><u>2020-2021</u></b>	<b><u>% Change</u></b>	Number change
Active	1068	865	-19.01%	-203
Associate	26	14	-46.15%	-12
Honorary	15	17	13.33%	2
Retired	1	1	0.00%	0
<b>Total</b>	1110	897	-19.19%	-213

Alabama	54	68	25.93%	14
Florida	143	128	-10.49%	-15
Georgia	158	150	-5.06%	-8
Kentucky	77	46	-40.26%	-31
Mississippi	34	46	35.29%	12
North Carolina	142	96	-32.39%	-46
South Carolina	182	124	-31.87%	-58
Tennessee	105	108	2.86%	3
Virginia	126	85	-32.54%	-41
Other	89	46	-48.31%	-43
<b>Total</b>	1110	897	-19.19%	-213

Male	293	216	-26.28%	-77
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Female	768	645	-16.02%	-123
Not Specified	49	36	-26.53%	-13
<b><u>Total</u></b>	1110	897	-19.19%	-213
White/Caucasian	673	556	-17.38%	-117
Black/African American	279	206	-26.16%	-73
Not Specified	98	88	-10.20%	-10
Hispanic/Chicano/Mexican American	33	32	-3.03%	-1
Asian/Pacific Islander/Filipino	22	13	-40.91%	-9
Native American	5	2	-60.00%	-3
<b><u>Total</u></b>	1110	897	-19.19%	-213

	<b><u>2019- 2020</u></b>	<b><u>2020- 2021</u></b>	<b><u>% Change</u></b>	Number change
Alabama	54	68	25.93%	14
Florida	143	128	-10.49%	-15
Georgia	158	150	-5.06%	-8
Kentucky	77	46	-40.26%	-31
Mississippi	34	46	35.29%	12
North Carolina	142	96	-32.39%	-46
South Carolina	182	124	-31.87%	-58
Tennessee	105	108	2.86%	3
Virginia	126	85	-32.54%	-41
Other	89	46	-48.31%	-43
<b><u>Total</u></b>	1110	897	-19.19%	-213
Public (4 Year)	393	266	-32.32%	-127
Private non-profit (4 Year)	293	249	-15.02%	-44
Public (2 Year)	185	200	8.11%	15
other	53	39	-26.42%	-14
Graduate/Professional	29	22	-24.14%	-7
Government Agency	22	12	-45.45%	-10
Lender	34	25	-26.47%	-9
Consultant	22	16	-27.27%	-6
Guaranty Agency	12	11	-8.33%	-1
Servicer	16	8	-50.00%	-8
Private non-profit (2 Year)	9	9	0.00%	0
Not Specified	11	8	-27.27%	-3
Private for profit (Business School)	6	10	66.67%	4
Private for profit (Technical/Trade)	17	17	0.00%	0
Secondary Market	2	2	0.00%	0
Retired Financial Aid Professional	3	3	0.00%	0
Health Related/Nursing	3	0	-100.00%	-3
<b><u>Total</u></b>	1110	897	-19.19%	-213



**Southern Association of Student Financial Aid Administrators**

**Chad Sartini/ Site Selection Chair**

**Executive Board Report/February 2021**

**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:**

- Currently researching venues for transition meeting June 2021. No proposals available at the time of this report.



Southern Association of Student Financial Aid Administrators

Theresa Mays/Global Issues

February 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**

**Keith Reeves/Long Range Planning**

**Executive Board Report/February 2021**

**Committee Members**

Marian Dill  
~~Bryan Erslan~~  
Ron Gambill  
Sandy Neel  
Sharon Oliver  
Keith Reeves  
Bill Spiers  
Tarik Boyd (ex officio)  
Celena Tulloss (ex officio)

**Committee Goals for 2020-2021:**

- Undertake a survey of membership satisfaction – delayed until fall 2020 due to current events
- Gather relevant data and information from the membership, Board, member state associations and other relevant organizations and associations to identify potential internal or external threats to the Association
- Review and assess the Association’s mission statement for change on a periodic basis
- Produce the July 1, 2021 through June 30, 2026 Long Range Plan

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

- The Committee is in agreement that a general membership satisfaction survey based, in large part, on the previous survey would be of little to no value at the present time. Seventy-five percent of the previous survey was designed to collect information regarding satisfaction with ATTENDING various SASFAA events (conference, new-aid, management institute, etc.) and the likelihood of attending future on-site events.
- The Committee intends to roll-forward the current LRP with some minor modifications with the recommendation that it be reviewed in a couple of years, when (hopefully) some resemblance of normalcy has returned for Board consideration.

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

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

**Activity Summary:**

- Current LRP is being reviewed for rolling forward.
- The Mission Statement, Vision Statement, Diversity Statement, and SASFAA Core Values are also being reviewed.



**Southern Association of Student Financial Aid Administrators**

**Stephen Adcock/President, Alabama**

**Executive Board Report/February 2021**

**Committee Members**

Members of the board were selected from a list of volunteers with diversity and inclusion in mind. All necessary positions, chairs, and committees were filled. Mentorships set up wherever we could, as well as co-chairs.

**Committee Goals for 2020-2021:**

Ensure that diversity and inclusion is central to selection of board members. Provide training opportunities throughout the year Provide professional development opportunities Deliver an outstanding annual conference with learning opportunities for members of many different experience levels Increase support from sponsors

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

N/A

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

N/A

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

N/A

**Activity Summary:**

AASFAA 2021 Virtual Conference scheduled for April 6-8

Preparation and Planning continues for this conference.





## Southern Association of Student Financial Aid Administrators

Dameion Lovett/President, Florida

Executive Board Report/February 2021

### **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
- FL Office of Student Financial Assistance Liaison/Newsletter, Louanne Standley, FL 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:**

- FASFAA Annual Clock Hour Workshop held October 26-30—221 attendees.
- Financial Literacy for Graduate/Professional Schools scheduled held on November 2<sup>nd</sup> for 51 members
- State of Florida Office of Student Financial Assistance Update webinar held on November 4<sup>th</sup> for 180 members.
- Held Statewide Workshop for 74 members
- FASFAA has held one NASFAA Credential Training Session on Professional Judgement on November 13<sup>th</sup> for 36 members.
- 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.
- Held end of the year Winter Solstice Celebration on December 16<sup>th</sup> for 43 members.
- Leadership Education for Association Professionals (LEAP) Program meets monthly. Comprised of 9 mentors and mentees. Program is designed to equip new and aspiring financial aid administrators with the resources and tools to become better leaders in our profession and provide opportunities of professional networking and involvement with FASFAA.
- 2<sup>nd</sup> Annual Statewide Director's Meeting will take place on February 10<sup>th</sup>—153 members registered.
- Designated four task forces for the year
  - Virtual Annual Conference—task force is working with the conference committee now that the conference has been moved to a virtual format.
  - FASFAA P&P Appendix—work is in progress.
  - Website Review/Improvement—task force will end its work on the website overhaul by the end of February 2021.
  - Long Range Strategic Plan—task force comprised of president, immediate past president, treasurer, bookkeeper, select members and past presidents. LRSP will be presented to board for approval in May 2021.



## Southern Association of Student Financial Aid Administrators

Maria Hammett/President, Georgia

Executive Board Report/February 2021

### 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:**

None.

**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 2020
  - We approved Sponsorship packages
    - Gold Package \$1,250
    - Silver (A) Package \$750
    - Silver (B) Package \$750
- October 2020
  - Sent out invitation for Webinar series
  - Purchased Zoom for webinar series
  - Board approved to give incentive for Spring Conference registration via drawing for those who attend Director’s Day.
- Directors’ Day
  - Via Zoom
  - Over one day or two days during November
  - Partners will be included
  - Will set a deadline and send doodle for some dates to the partners to see who signs up the most
  - Partner’s games approved
  - Diversity Chair presented webinar for Unconscious Bias
- December 2020

Webinar Series going well!

### **FALL 2020 WEBINAR SERIES**

The fall webinar series will kick-off with a great presentation by Dr. Michael Hester regarding unconscious bias. All of us as humans first, then financial aid administrators must be dedicated to fostering and promoting inclusive environments and that always starts with each of improving how we view the world around us. Then we move on to some heavy hitters in regards to financial aid compliance that every office will want to ensure is covered.

#### **Unconscious Bias 10/21/2020 @ 11 am**

Dr. Michael Hester recently completed his twenty-fifth year as the Director of Debate at the University of West Georgia. Under his leadership, UWG Debate has won three national championships, most recently in 2015, twice being national runner-up, and finishing 3<sup>rd</sup> in the nation two other times. He has twice been recognized as National Coach of the Year, most recently in 2017. In addition to coaching debate, Dr. Hester has held several titles at UWG, including Dean of the Honors College from 2012 to 2015, and Special Assistant to the Chief Diversity Officer from 2017 to 2020. Since 2018, he has been the Coordinator for the African American Male Initiative, and he also serves on the USG’s AAMI Advisory Council and the Georgia Association of Diversity Officers in Higher Education. Independent of his work at UWG, Dr. Hester is actively involved in international debate, teaching in China, East Africa, and the Caribbean, serving on the Board of Directors for the Jamaican Association for Debating & Empowerment, as well as on the board of the non-profit organization, Friends of Southern Haiti.

### **NASFAA Core R2T4s**

**11/04/2020 @ 10 AM**

NASFAA is offering 50% off voucher for all online training. – Title IV returns is always on the top findings list! This training will provide an in-depth review of regulatory requirements for Title IV Returns. This session is good for those just beginning Title IV returns and those who want to reaffirm their knowledge of Title IV requirements.

### **NASFAA Core Verification**

**11/18/2020 @ 10 AM**

NASFAA is offering 50% off voucher for all online training. – Verification has become easier with the Data Retrieval Tool, but there is still a wealth of knowledge required to manage federal Verification requirements. This session will go over all the details and provide you the confidence needed when facing an audit.

### **Making Financial Aid Make Sense (A Discussion on Communication Best Practices)**

**12/10/2020 @ 10 am**

What works best for your office? What works best for your students? What can FAA's do to ensure our communications are clear, concise, and accurate for students and their families. Join this session for an open discussion regarding communication best practices from colleagues in the financial aid community.

A discussion with Wilmani Humphries, Sr. Financial Aid Advisor, University of West Georgia, GASFAA Diversity Chair | Natasha Collins, Senior Associate Director of Operations, Mercer University | Alyssa Takatori, Assistant Director, Georgia State University | Tara Roberson, Assistant Director, Georgia State University.

### **WINTER WEBINAR SERIES**

For the winter webinar series, we will be providing valuable compliance training for both federal and state programs. We picked topics that are worthy of watching over and over again because the scope of regulatory compliance is huge. We will also be presenting a Federal Update to ensure we are covered on all changes.

#### **R2T4s in Modules**

**01/20/2021 @ 10 AM**

Modules are becoming more and more popular and with them, more and more regulations!

#### **Understanding your SAP Policy**

**01/27/2021 @ 10 am**

All schools must have an SAP Policy. This is also a common finding area. The Department of Education provides latitude as to what a school **can** include in their policy. This session will provide you with the SAP requirements and guidelines you have to make choices of what you want to include in your policy – whatever you decide you will be held to in an audit. This is an extremely important session for all schools.

#### **Federal Update**

**02/03/2021 @ 10 am**

This session goes without any introduction! I think for the 2020 year, we all could use a federal update on almost a weekly basis. All of us can benefit from a federal update!

#### **CHECS**

**02/10/2021 @ 10 am\***

A comprehensive overview of CHECS (College HOPE Eligibility Calculation Service). The importance of this session cannot be understated. All staff members involved with state aid should have a proficient working knowledge of the CHECS system and the responsibilities of the institution.

#### **Top GSFC Program Review Findings**

**02/17/2021 @ 10 am\***

This will be a session no one will want to miss as we will detail the top findings in State audits and what you can do to help prevent and mitigate these findings at your school.

#### **Dual Enrollment**

**02/24/2021 @10 am\***

A comprehensive overview of the Dual Enrollment program. This session will give you all the information you need to efficiently process financial aid for students enrolled in a dual enrollment program with your institution.

**Bonus Session (HOPE & ZELL 101)**

**03/03/2021 @ 10 am\***

- January 2021
  - Motion was approved to consult with Lake Lanier regarding contract and having a virtual conference.
  - Pennie Strong consulted with lawyers at GSFC for moving conference to spring 2022.
  - Look into freezing insurance
  - Balance budget review planned to determine any fees for conference

Review Bylaws for membership options.



**Southern Association of Student Financial Aid Administrators**

**Michelle Standridge/President, Kentucky**

**Executive Board Report/February 2021**

**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.

February 9, 2021 SAR Comment Codes

March 9, 2021 Ethics

April 13, 2021 R2T4

KASFAA is currently making final decisions on the spring conference and if it will be completely online or in a hybrid format. The spring conference is planned April 14-16, 2022 at the Clarion Hotel in Lexington, KY.





**Southern Association of Student Financial Aid Administrators**

**Renotta Shed/President, Mississippi**

**Executive Board Report/February 2021**

**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/February 2021**

**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 NCASFSA/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:**

N/A

**Activity Summary:**

Spring 2021 NCASFSA Virtual Conference, April 6-8



**Southern Association of Student Financial Aid Administrators**

**Traci Singleton/President, South Carolina**

**February 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**

**Danette Seale/President, Tennessee**

**Executive Board Report/February 2021**

**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...*Pursue Golden Opportunities ~ Rise Up & Reach Out*

- 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 State Presidents meeting via zoom on October 23, 2020, and the Executive Board meeting on October 24, 2020 in Myrtle Beach, SC.

TASFAA hosted five additional #TASFAAThursday webinars free for paid members from October 22<sup>nd</sup> through November 19<sup>th</sup> with the help of our vendors and covering various topics to include an “After the Elections” webinar that was highly attended. A combined total of 459 members registered for the webinars this past fall! TASFAA wishes to thank all our sponsors and individuals who assisted President Seale with the planning of our #TASFAAThursday fall training series (listed in order of webinar): TSAC, Leah Louallen and her colleagues; Citizen One, Patty Peterson; Ascendium, Debbie Murphy; College Ave, Glenn Chance; Edsouth, Ron Gambill; and Sallie Mae, Jonathan Looney.

The TASFAA/THEC/TSAC Drive-In to Your Future FAFSA Completion event concluded in November 2020. With the hard work and partnership across the Volunteer State, we hosted eighteen FAFSA Drive-In locations, saw over one thousand students to register, and had over one hundred expert volunteers to help them! All in all, a great *opportunity* for the Volunteer State to find innovative ways to serve our students and communities during this time.

President Seale and President-Elect Norrod hosted a TASFAA Afterhours During FSA event on Thursday, December 3, 2020 via Zoom. This was a way to have a TASFAA State dinner that has historically been held during the Federal Student Aid Training Conference. In attendance were Brent Tener, NASFAA National Chair-Elect, and Celena Tulloss, SASFAA President, along other members. The event was nice reprieve from work and the day’s training with an optional ugly sweater contest to say BYE BYE 2020!

Mrs. Seale attended the SASFAA Nominations and Elections Presentation via Zoom on December 17, 2020, and an additional SASFAA meeting on February 4, 2021 to review a proposal on diversity.

Seale attended the TASFAA conference committee and held an executive board meeting via zoom on January 7, 2021 & January 8, 2021 respectively due to the revised restrictions on gatherings in the state of TN over the winter holidays. The Executive Board voted to host the TASFAA Annual Spring Conference virtually on January 8<sup>th</sup> from the Conference Committee recommendation due to state of TN COVID-19 cases, the uncertainty of vaccines and feedback from member schools that indicated strict travel restrictions and budget constraints. The Executive Board took this *opportunity* to provide the conference **free** to all paid members, as well as offer a special one-time Virtual Conference Sponsorship opportunity valued for \$500 for our sponsorship partners. Both motions passed unanimously. While the cost of sponsorship may be lower, the benefits are basically the same, except being able to set-up a table in a vendor hall. This year’s conference theme is based on the Friends TV Show! T-shirts to raise money for this year’s charity, JDFR, Type 1 Diabetes research, will be available for sale along with other activities planned with following front and back logos:



The TASFAA Annual Spring Conference is scheduled for April 19-21, 2021 via Zoom, with a hybrid Executive Board meeting scheduled for April 18, 2021 before kicking off the 2021 virtual conference. A Virtual Conference Hub was established that will stay overnight at the Cool Springs Marriot in Franklin, TN for the duration of the conference.

Seale held an Executive Board meeting on January 19, 2021 to review the slate of candidates for the elections. The candidates were approved and the TASFAA elections opened on February 3, 2021, closing February 11, 2021.

President Seale is scheduled to introduce herself as TASFAA President to the SASFAA Leadership Symposium on February 5, 2021.



**Southern Association of Student Financial Aid Administrators**

**Sherika Charity/President, Virginia**

**Executive Board Report/February 2021**

**Committee Members:** change in Secretary due to career change of previous Secretary.

**VASF AA 2020-2021 Board**

<b>President</b>	Sherika Charity
<b>Past President</b>	Brad Scaggs
<b>President-Elect</b>	Beth Armstrong
<b>Secretary</b>	<b>Dominique Maddux-Jackson</b>
<b>Treasurer</b>	Marc Vernon
<b>Treasurer-Elect</b>	Teresa Harrison
<b>Representative-at-Large</b>	Scott Morrison
<b>Representative-at-Large</b>	Laurie Owens
<b>Representative-at-Large</b>	Joe Dobrota
<b>Representative-at-Large</b>	Kesha Wilson

**Committee Goals for 2020-2021:**

No changes from previous report.

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

NONE.

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

NONE.

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

NONE.

**Activity Summary:**

Winter Board Meeting (virtual): held January 25, 2021

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

- February 18, 2021

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

- March 4, 2021

VASF AA Spring Conference Training (virtual): Dates TBD



**Southern Association of Student Financial Aid Administrators**

**Jacquelyn LeSueur/Special Project**

**Diversity Leadership Program**

**Executive Board Report/February 2021**

**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:**

Drafted a proposal and circulated to the state presidents to consider a potential partnership. The full proposal will be provided to the board at a later date.





**Southern Association of Student Financial Aid Administrators**

**Heather Boutell/ Mentorship Guide Taskforce Chair**

**Executive Board Report/February 2021**

**Committee Members/State Executive Board:**

Heather Boutell, Vanderbilt University School of Medicine - Chair  
Chad Sartini, Virginia Tech  
Steve Smith, University of West Alabama  
Jacquelyn LeSueur, Mississippi University for Women

**Committee/State Goals for 2020-2021:**

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):**

None

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

None

**General Updates:**

Former Chair Bryan Erslan moved out of the SASFAA region, and Heather Boutell was asked to take over his duties. New Chair Boutell received the working copy of the SASFAA Mentorship Guide in mid-January. Chair Boutell held a meeting with President Tulloss last week to discuss the working copy and what still needs to be completed. The other committee members will be contacted in a few weeks with the working draft to provide feedback.



**Southern Association of Student Financial Aid Administrators**

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

**Executive Board Report/February 2021**

**Committee Members:** Michael Birchett

**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.

- 2020 SASFAA partners have all been solicited for the new business directory in hopes that they will continue their sponsorship for 2021.
- Directory has gone through several drafts and hope to be in the final form soon – before SASFAA 2021.
- We have had several new business partners express interest in being a partner and everyone loves the idea of the directory.

**Motion/ Action Item(s):** None

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

**Activity Summary:**

Been in ongoing contact with all potential SASFAA vendors and paid SASFAA vendors to collaborate on the new business directory.