

Southern Association
of Student Financial
Aid Administrators
February 2022



Agenda and
Board Reports

Prepared by Secretary Sarah Dowd

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**AGENDA
SASFAA Board Meeting
February 18 - 19, 2022
Montgomery, Alabama**

Life shrinks or expands in proportion to one's courage.

Anais Nin

Friday, February 18

<i>6:15 PM</i>	<i>Board Dinner</i>	<i>Lobby</i>
<i>6:30 PM</i>		<i>Irish Bred Pub</i>

Saturday, February 19

<i>8:00 AM</i>	<i>Continental Breakfast</i>	<i>Montgomery 7</i>
<i>9:00 AM</i>	<i>Board Meeting</i>	<i>Montgomery 7</i>

Call to Order	Celena Tulloss
Roll Call / Establish a Quorum	Sarah Dowd
Welcome to Alabama	Dr. Jim Theeuwes

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

Action Item: Approval of minutes of October 24, 2021 meeting of the board.

Motion/Action Items	Celena Tulloss
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Action Item: Approval of updated Legislative Guide Wayne Kruger

Action Item: 2022 New Aid Officers Workshop Addendum A Leigh Ann Hussey

Round of Successes (2-3 minutes each)	All
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<i>12:00 PM</i>	<i>Lunch</i>	<i>Riverview 2</i>
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New Business	Celena Tulloss
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State Treasurer's Group	Katie Conrad
Position Descriptions	Celena Tulloss
SASFAA Nine News	Celena Tulloss
Volunteer Form	Celena Tulloss

Old Business	Celena Tulloss
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Adjournment	Celena Tulloss
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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 2021-2022:

- 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:

Request a review of the P&P verbiage surrounding employment changes and elected board positions, utilizing a committee comprised of the Secretary, Past President, President Elect, Vice President, Secretary, Treasurer and Association Governance Chair.

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
- Based on the final 2020-2021 budget, began discussions with Budget and Finance about potential opportunities to invest the overage back into the membership during the 2021-22 year

Conference-

- Attended site visit to the 2022 Conference Hotel, the Renaissance Montgomery Hotel and Spa, Montgomery, AL, October 1-3, 2021

- Met with Conference Chairs Felicia Ailster and Melissa Smith, Site Selection Chair Joan Bailey and Sponsorship Committee Chair Stephanie Watson to look at financial obligations for the 2022 conference, January 6, 2022 via Zoom and follow up meeting with Budget and Finance Chair Marian Dill on January 7, 2022 via Zoom.

State Conferences-

- Attended the SCASFAA Annual Conference, October 17-19, 2021, Myrtle Beach, SC

NASFAA –

- Attended NASFAA Board Meeting July 15, 2021 via Zoom
- Attended NASFAA Board Meeting September 24, 2021 via Zoom
- Attended NASFAA Regional Presidents meeting August 3, 2021 via Zoom
- Attended NASFAA Regional Presidents meeting October 22, 2021 via Zoom
- Attended NASFAA Board Meeting November 15-16, 2021, Colorado Springs, CO
- Attended NASFAA Regional Presidents Meeting January 26, 2022 via Zoom
- Attended NASFAA Board Meeting February 1, 2022 via Zoom



Southern Association of Student Financial Aid Administrators

Michael D. Morgan / President-Elect

Executive Board Report/February 2022

Committee Members

Under construction and consideration “continuity and succession”

Committee Goals for 2021-2022:

LRP and GAP Goal Activity to date:

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

Requested to consider 2023 conference location in regionally centralized location to allow the option of driving as well as well as having a regional airport to allow access for members and guests who need to fly. Locations under consideration Knoxville, Chattanooga, Charlotte or Atlanta. Negotiations delayed due to threat of COVID variants and impact on immediate conference.

Though location has not been selected, Stephanie Miller and I have had multiple discussions on feel of conference and review ways in which the design of the conference may be altered to prepare for post pandemic attendance.

Attended NASFAA Leadership Conference in Washington DC, in preparation for year as SASFAA president February 12-16th, 2022. Association Governance and Strategy, Diversity and Networking were the focus of the conference. We also had the opportunity to hear from DOE and get the inside scoop on some of the politics that may influence the decisions on financial aid policy in the near future.

Prepare for President Elect Pre-conference- I want to thank President Celena Tulloss, President Bill Spiers, President Brad Barnett, and “Future” President Jacquelyn LeSueur for agreeing to provide substance to the President Elect workshop-

8:00 – 9:00 AM	Continental Breakfast	
9:01 – 9:15 AM	Welcome	Michael D. Morgan, Pres-Elect
9:21 – 9:43 AM	Greetings/Leadership	Celena Tulloss, President
9:44 – 10:29AM	Association Governance	Brad Barnett, NASFAA Chair-elect
10:45 – 11:14 AM	Role of Elected Officers	Bill Spiers, Past President
11:15 – 11:59 AM	Diversity in Associations	Jacquelyn LeSueur, Equity, Inclusion & Global
12:00 – 1:00 PM	Lunch (Words of Wisdom)	With Executive Board
	“Looking Back, What Would You Have Done Differently”	
1:02 PM – 2:15 PM	Innovations and Implications	Brainstorming Session



Southern Association of Student Financial Aid Administrators

Bill Spiers / Past President

Executive Board Report / February 2022

Committee Members

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:

Solicited nominations from the membership for the positions of President-Elect and Secretary.
Solicited nominations from the membership for awards.
Submitted a dual slate of candidates for the open leadership positions
Submitted nominations for awards.
Attended multiple SASFAA Board Meetings.
Attended the in-person NASFAA meeting in Colorado Springs.
Attended multiple NASFAA Zoom meetings.

Motion/ Action Item(s):

It is recommended that SASFAA create a new award recognizing individuals who have been active in SASFAA, but not involved in leadership, who have a lengthy career in financial aid.

Policy & Procedure: Changes/ Recommendations:

Consider reducing the amount of time where the announcement of candidates is presented to the members from 30 days to a reduced time span.

Activity Summary:



Southern Association of Student Financial Aid Administrators

Leigh Ann Hussey / Vice President

Executive Board Report / February 2022

Committee Members

April Tretter – NAOW Curriculum Coordinator

Committee Goals for 2020-2021:

- Host 4 webinars for membership
- 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):

2022 New Aid Officer Workshop

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

- 2 pre-conference workshops: NASFAA R2T4 and Director’s Summit
- In January, it was decided that it would be possible to pursue an in-person NAOW. Wofford was the last institution to host an in person NAOW. The contract was extremely favorable to SASFAA. The attendance there was higher than previous years, and attendees gave the facilities and meals very high marks in the evaluation. In concern for both SASFAA’s financial commitment and attendees comfort level with traveling, I obtained a quote from Wofford for 2022 NAOW. The facility/housing pricing is attached. Meal prices are \$4.65 breakfast, \$6.75 lunch, \$7.50 dinner.



Southern Association of Student Financial Aid Administrators

Sarah Dowd / Secretary

Executive Board Report / February 2022

Committee Members

Nancy Ferguson, University of Georgia

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:

- Updated and Posted on website P&P Manual
- Distributed Annual Business Meeting Minutes to the Membership

Motion/ Action Item(s):

None at this time

Policy & Procedure: Changes/ Recommendations:

None at this time

Activity Summary:

- Provided board meeting set up support to President as needed.
- Posted Policies and Procedures Updates to the association website
- Sent report notices, reminders
- Distributed 2021 Business Meeting Minutes to membership via email
- Compiled reports and agenda for February meeting of the board
- Posted Legislative Guide and resources to website Resource Page



Southern Association of Student Financial Aid Administrators

Sarah Baumhoff / Treasurer

Executive Board Report / February 2022

Committee Members –

Committee Goals for 2021-2022:

LRP and GAP Goal Activity to date:

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:



Southern Association of Student Financial Aid Administrators

Marian Dill / Budget and Finance Chair

Executive Board Report / February 2022

Committee Members

Committee Goals for 2021-2022:

LRP and GAP Goal Activity to date:

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:



Southern Association of Student Financial Aid Administrators

Felicia Ailster and Melissa Smith / Conference Co-Chairs

Executive Board Report / February 2022

Committee Members

Stephanie Miller – Central Alabama Community College (AL)
Jessica Alston – Georgia Piedmont Technical College (GA)
Alicia Keaton – University of Central Florida (FL)
Sheia 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)
Jo Wallace – TSAC (TN)
Michelle Standridge – Spalding University (KY)
Theresa Mays – Trenholm State (AL) – Local Arrangements

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:

- There are 326 current conference registrations.
- The hotel room block has been met.
- Federal presenters will be providing training via zoom general and concurrent sessions.
- Anthony Ray Hinton from the Equal Justice Initiative non-profit organization will be speaking Sunday night for our charity introduction.



Southern Association of Student Financial Aid Administrators

Dr. Stephanie Watson / Sponsorship

Executive Board Report / February 2022

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:

- ✓ Emailed complimentary conference registration codes and hotel shipping information to vendors
- ✓ Secured topics and presenters for Leadership Level Lunch and Learns
- ✓ Worked with Daniel to secure data for the email blasts
- ✓ Emailed Joan proposed shipping data for incoming and outgoing vendor items
- ✓ Secured logos, ads, and banners for respective vendors
- ✓ Decided on and printed Vendor Bingo cards to increase vendor traffic (3 prizes: 2022 conference registration, \$50 gift card, and \$25 gift card)
- ✓ Decided on \$10 charity donation for each vendor as a gift from SASFAA
- ✓ Secured 30 second YouTube videos from sponsors
- ✓ \$64,100 in total commitments as of 02/14 (6-Leadership level, 8-Advocacy Level, 14-Support Level, 1 Advertising Combo and 1-President's Reception)



**Southern Association of Student Financial Aid Administrators
April Tretter / Communications and Outreach Committee Chair
Executive Board Report / February 2022**

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 / February 2022

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

Wayne Kruger / Legislative Relations Committee

Executive Board Report / February 2022

Committee Members: All committee members are paid and active members.

Chair: Wayne Kruger Kruger.wayne@spcollege.edu

Florida Rep: Kris Hatcher kristopher_hatcher@hotmail.com

Georgia Rep: Joe Buchholz joe.buchholz@campuslogic.com

North Carolina Rep: Krista Ringler kmringle@ncsu.edu

South Carolina Rep: Adam Ghiloni aghiloni@tctc.edu

Virginia Rep: Adam Bailey adamrb@vt.edu

Mississippi Rep: Edward Harrison eaharrison@muw.edu

Alabama Rep: Stephanie Miller stmiller01@cacc.edu

Kentucky Rep: Theresa Lowder lowdert@bereda.edu

Tennessee Rep: Ron Gambill rgambill@edsouth.org

Member-at-large: Michael Morgan morganm@rhodes.edu

Committee Goals for 2021-2022:

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. 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): Approval of updated Legislative Guide

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

Activity Summary:

- Continued to have the NCHER Weekly rundown sent out weekly.
- Reviewed and updated the legislative guide and submitting for approval.
- Submitted to NASFAA a call to action on the importance of HEERF Funds to our schools and students and provide a template to all states in the region. Provided a break down by state of the amount of HEERF funds received and other data for the letters.



Southern Association of Student Financial Aid Administrators

Zachary Christian / Membership Chair

Executive Board Report / February 2022

Committee Members:

Christina Bowen, Bluegrass Community and Technical College (KY)
 Jaime Missimer, Pearl River Community College (MS)
 Nicole Patrick, Mississippi University for Women (MS)
 Kyle Wade, Spartanburg Methodist College (SC)
 Janee Knippenberg, PNC Bank (NC)

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

SASFAA 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) - COMPLETED; began cleaning up membership database – using “State Old” to update “State New” to allow for consistency within the membership database; ongoing, but currently up-to-date; Beginning plans to enhance the process to solicit volunteers for the upcoming year.

Solicited committee members to assist with goals.

2021-2022 Membership Data (As of February 9, 2022):

	<u>2020-2021</u>	<u>2021-2022</u>	<u>%Change</u>	<u>Number Change</u>
Active	1166	1053	-9.69%	-113
Associate	16	9	-43.75%	-7
Honorary	17	19	11.76%	2
Retired	1	0	-100.00%	-1
Total	1200	1081	-9.92%	-119
Alabama	99	105	6.06%	6
Florida	169	122	-27.81%	-47
Georgia	190	203	6.84%	13
Kentucky	79	59	-25.32%	-20
Mississippi	61	51	-16.39%	-10

North Carolina	122	110	-9.84%	-12
South Carolina	171	164	-4.09%	-7
Tennessee	137	103	-24.82%	-34
Virginia	114	104	-8.77%	-10
Other	58	60	3.45%	2
Total	1200	1081		-119
Public (4 Year)	359	314	-12.53%	-45
Private non-profit (4 Year)	334	292	-12.57%	-42
Public (2 Year)	279	257	-7.89%	-22
Other	50	45	-10.00%	-5
Graduate/Professional	31	25	-19.35%	-6
Government Agency	12	17	41.67%	5
Lender	33	30	-9.09%	-3
Consultant	20	17	-15.00%	-3
Guaranty Agency	14	10	-28.57%	-4
Servicer	11	11	0.00%	0
Private non-profit (2 Year)	9	18	100.00%	9
Not Specified	11	13	18.18%	2
Private for profit (Business School)	12	6	-50.00%	-6
Private for profit (Technical/Trade)	20	18	-10.00%	-2
Secondary Market	2	2	0.00%	0
Retired Financial Aid Professional	3	5	66.67%	2
Health Related/Nursing	0	1	100.00%	1
Total	1200	1081		-119
Male	266	238	-10.53%	-28
Female	882	797	-9.64%	-85
Not Specified	52	46	-11.54%	-6
Total	1200	1081		-119
White/Caucasian	718	656	-8.64%	-62
Black/African American	296	287	-3.04%	-9
Not Specified	117	90	-23.08%	-27
Hispanic/Chicano/Mexican American	46	31	-32.61%	-15
Asian/Pacific Islander/Filipino	19	16	-15.79%	-3
Native American	4	1	-75.00%	-3
Total	1200	1081	-9.92%	-119
As of date:	6/30/2021	2/9/2022		



Southern Association of Student Financial Aid Administrators

Joan Bailey / Site Selection Chair

Executive Board Report / February 2022

Committee Members

FL – Irma Molinares
GA – Tarik Boyd
AL – Stephanie Miller
VA – Chad Sartini
GA – Aria Simmonds

Committee Goals for 2021-2022:

- 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 – decision was made to cancel event and do pre-conference Director's summit
- Secure and finalize location for first in person board meeting – Nashville Tennessee
- Finalize arrangements and conducted 2021 conference hotel site visit.
- Finalize all activities required to facilitate the annual conference as the primary contact for the site

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

NONE

Activity Summary:

- Will be able to speak on 2022 Conference, providing all site updates.
- Also, will now resume search for sites for 2023 conference and 2022 Transition meeting.
- Announce Transition dates



Southern Association of Student Financial Aid Administrators

Jacquelyn LeSueur / Equity, Inclusion, & Global Issues Chair

Executive Board Report / February 2022

Committee Members

Morgan Chandler- **Jefferson State**
Wilmani Humphries- **West Georgia**
David McMillion – **University of North Georgia**
Rhonda Bryant- **University of Kentucky**
Alexander David- **ECPI**
Regina Gilbert- **Lipscomb University**
Natasa Novicevic- **University of Mississippi**
Danie Barkowitz- **Valencia College**

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):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

The Equity, Inclusion & Global Issues –

- 1) The Equity, Inclusion & Global Issues Committee held its first meeting on **Monday, November 15th**. We discussed sending out information through SASFAA communications, topic discussion/presenters for the SASFAA Conference, and a possible webinar/workshop with the Peace and Justice Institute

- 2) Sent out communication to the SASFAA community regarding Black History Month and providing resources and facts. Will continue to do so for the remaining of the month with preparation to do the same for Women's Heritage Month in March.
- 3) The Equity, Inclusion & Global Issues session, at the SASFAA Conference, will be Eliminating Bias in Financial Aid on Monday, February 21st from 10:15 am to 11:15 am. Our very own, Daniel Barkowitz, Natasa Novicev, and David Alexander will serve as the panelist, and I will be the moderator.
- 4) Met with Rachel Allen who serves as the Director for the Peace and Justice Institute at Valencia College. Discussed a possible webinar/workshop centered around conversations and inclusiveness. Was informed that I would receive a proposal from the Peace and Justice Institute. Proposal was received with a total fee of \$3,000 if we would like to move forward with the workshop. **Provided the proposal as an attachment.**

Secretary note: Addendum B

- 5) Our next Equity, Inclusion & Global Issues Meeting will be held the first week of March.
- 6) 6) Participated on the Conference Committee for SASFAA.

SASFAA Diversity Leadership Program –

- 1) Met with DLP Participants on December 1.
- 2) DLP Participants will be serving as moderators during the SASFAA Conference.
- 3) DLP Participants asked for networking opportunities during our meeting together. Participants and mentors will be attending the Networking Hour during the Conference. Please feel free to introduce yourself and welcome each DLP participant.

Mentors, DLP participants, President Celena, and myself will be attending dinner together on Tuesday, February 22nd at 5pm.



Southern Association of Student Financial Aid Administrators

Dr. James Theeuwes / Alabama President

Executive Board Report / February 2022

Committee Members

Committee Goals:

LRP and GAP Goal Activity to date:

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

AASFAA will be offering Virtual spring training on March 24th. We have a full agenda and this is open to any AASFAA members. The charge for this training is \$10 plus paid membership.

AASFAA will have a Fall conference for 22-23. This will be held at the Marriott Resort Auburn-Opelika Grand National from Monday 09/19/22 to Thursday 09/22/22. Planning has already started. Come one come all!!

Dr. Angela Smith, President Elect for AASFAA, will be attending the NASFAA Leadership and Legislative Conference on Feb 14-16 in Washington D.C.

AASFAA has a host table set up in the vendor area please stop by for some sweet treats.



Southern Association of Student Financial Aid Administrators

Katie Conrad / Florida President

Executive Board Report / February 2022

FASFAA Goals for 2021-2022:

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.

Activity Summary:

Conducted Executive Board meetings in October and November via Zoom. The January Executive Board meeting was held in person in conjunction with our New & Intermediate Aid Officers Workshop in Lake Buena Vista, FL. The Conference Committee also met to continue planning for the conference. Registration for our Annual Conference opened on February 7, 2022.

Continue to represent FASFAA by attended meetings as part of the College Ready Florida Steering Committee. Assisting them with planning the College 101 events for the Spring sessions. FASFAA Members will present and assist with answering questions via chat for 'FAFSA next steps' for high school seniors on February 10th at 7:00.

Our 5 Region Representatives are planning to hold Spring Regional workshops during March. The workshop is free and open to all FASFAA members. The agenda will include a NASFAA Authorized Trainings and other timely topics. Two regions will hold the workshops virtually, while the other three plan to move forward with in person workshops.

The FASFAA Fiscal Concerns Committee is conducting an internal audit of the 2020-2021 fiscal year. The audit will be completed by our March Board Meeting, where the results will be shared with our Board.

The FASFAA Clock Hour Workshop was held at the end of October via Zoom. Chair Tiffany Randolph and her committee held a very success workshop with 157 registrants.

The FASFAA New & Intermediate Aid Officers Workshop was held January 19-21 at the Embassy Suites in Lake Buena Vista, FL. This in-person event had 26 registrants and 4 covid related cancellations. Our goal was 30 participants – so we were pleased with the turn out considering the surge in the Omicron variant of Covid-19.

FASFAA and FCAN leaders presented together at the College Board Forum in October 2021. We talked about our collaborative efforts for FAFSA Completion in the state of Florida.

FASFAA Scholarship and Charity Committee has selected the Youth Crisis Center of Jacksonville as the charity we will support for this year. We will collect monetary donations, as well as donations of household goods and supplies during our Annual Conference in May/June.

The monthly webinar series offered the following webinars in 2021:

- December 13th, 2021 [A Snapshot of Financial Aid Practice during COVID-19](#) Saralyn McKinnon-Crowley PhD
- November 17th, 2021 – When A Bill Really Becomes a Law: How Does Neg Reg Work; And Why Should I Care? Daniel Barkowitz, Michaela Martin, Alyssa Dobson, & Will Shaffner
- October 29th, 2021 – [Satisfactory Academic Progress and Diversity, Equity, & Inclusion](#) = Debbie Raucher & Sarah Pauter

The Webinar series will continue with the following schedule in 2022:

- [February 28th @10am \(EST\) – Ask a FASFAA Financial Aid Director](#) : Alicia Keaton (UCF), Francisco Valines (FIU), & Dameion Lovett (USF)
- [March 23rd @10:30am \(EST\) – Believing the Unseen - Invisible Disabilities](#) : Jax Rogero
- [April 15th @10:30am \(EST\) – Financial Literacy](#) : Will Hunter
- [April TBD – Loan Repayment = TBD](#)
- [May 11th @10am \(EST\) – Appreciation at Work — Is That a Thing?](#) : Chantel Carter
- [June 17th @10am \(EST\) – Satisfactory Academic Progress \(NASFAA Credential\)](#): Karissa Lawson

FASFAA currently has 781 active 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 / February 2022

Committee Members

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.

LRP and GAP Goal Activity to date:

None

Motion/ Action Item(s):

None

Policy & Procedure: Changes/ Recommendations:

None

Activity Summary:

Since the October meeting our board had a successful Fall Training. We had over 100 attendees and had positive feedback about getting back in person and the training that was provided. We are in the thick of planning the Winter Workshop and Summer Conference. We have our in person winter board meeting scheduled for March 2nd.



Southern Association of Student Financial Aid Administrators

Rhonda Bryant / Kentucky President

Executive Board Report / February 2022

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:

Planning for in-person KASFAA Spring Conference April 13-15 in Lexington is progressing. Our conference theme is "Not All Heroes Wear Capes" in recognition of people who help others – especially during the past two years. The SASFAA President-Elect Exchange will allow Nadine Bailey, Florida President-Elect, to attend our conference. KASFAA President-Elect, Mark Messingschlager, will attend North Carolina's conference in April. A one-to-one exchange with Florida was not possible since their conference dates conflict with our transition meeting.

KASFAA held an in-person new aid officer workshop in November. This training for new association members had not been offered in two years due to our in-person conferences being canceled. The workshop attendance was good and feedback from attendees was positive.

KASFAA has continued to offer virtual trainings for the benefit of new and seasoned members. Topics offered this spring include: Tax Document "Deep Dive" Training for Verification, Working Efficiently in the Office and at Home, Resolving Conflicting Information. The trainings are popular with our membership and enjoy a robust attendance.



Southern Association of Student Financial Aid Administrators

Megan Smith / Mississippi President

Executive Board Report / February 2022

SASFAA LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

- Newsletter is being drafted for February distribution outlining upcoming events, new directors in the state, and etc.*
- Discussing options for FinAid 101 to be held in mid-spring or combine with conference.
- Virtual Board meeting will be held February 8th.
- Postcards and magnets were sent to each institution for the holidays.*
- Organized MASFAA dinner during SASFAA conference.
- Submitted letter to Congressmen regarding HEERF assistance.
- Selected conference site and date.



Southern Association of Student Financial Aid Administrators

Zilma Lopes / North Carolina President

Executive Board Report / February 2022

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 a successful in-person Fall 2021 Conference last November
 - 123 attendees
 - Raised \$1,633 in charity funds for a NCASFAA Scholarship Fund
 - Overwhelming positive feedback from the membership about the conference overall.
- Preparing for Spring 2022 Conference:
 - **Location:** Holiday Inn Resort - Wrightsville Beach, NC
 - **Dates:** Sunday, April 3rd to Wednesday, April 6th, 2022
- Working with my board and committees on various matters:
 - Refund Policy
 - Financial Investments Policy



Southern Association of Student Financial Aid Administrators

Carolyn Sparks / South Carolina President

Executive Board Report/February 2022

SASFAA LRP and GAP Goal Activity to date:

- Not applicable

Motion/ Action Item(s):

- None currently

Policy & Procedure: Changes/ Recommendations:

- None currently

Activity Summary:

- Our annual conference was held in person at Embassy Suites Oceanfront Myrtle Beach October 17-20, 2021, with our registration number hitting 135 attendees. Our conference charity was the Parkinson's Foundation of the Carolinas. During the conference, a Tulip Trot was held as one of our charity fundraisers with virtual and in-person participation options, raising \$2,691.22. Our two pre-con topics were Satisfactory Academic Progress and Cost of Attendance; both NASFAA-U Credential sessions. Overall, the conference had high ratings but the virtual portions were not highly favored. We knew that while planning but also knew we were taking chances to hold an in-person conference. Had we cancelled, SCASFAA would have had a large hotel financial liability.
- Sam Hicks, SCASFAA Vice President and Chair of our Professional Development Committee, has facilitated our virtual SCASFAA book club. The current book is *The Privileged Poor* by Anthony Abraham Jack. We've had great discussions throughout the first three sessions with one more to go. Thirty-one members registered for the first book club and have had 5-15 participants each session. Our spring book club reading will be Brene Brown's *Dare to Lead*.
- New/Intermediate Aid Workshop will be held March 22-23rd at Piedmont Technical College-Newberry campus. To date, 11 members are registered. Two NASFAA U credentials will again be offered: SAP and COA.
- Leadership Symposium is scheduled for May 17th at Columbia College.
- SCASFAA Board meeting was held Thursday, January 27, 2022, at the SC Student Loan Corporation office. Adam Ghiloni, our current Legislative Relations Chair, facilitated a consensus workshop to identify state legislative and regulatory priorities of the association. These principles will then be used during quarterly conversations with state agencies to further develop the Association's relationship while collaborating to better serve our students.
- A successful SCASFAA election was held and announced earlier this year. Our new officers for 2022-2023 are as follows:

President-Elect	Zachary Christian	SC Higher Education Tuition Grants Commission
Vice President	Adam Ghiloni	Tri County Technical College
Secretary	Danielle Rymer	University of South Carolina
Treasurer-Elect	Michelle Upchurch	Limestone University
Member-at-Large	Jernitha Smith	University of South Carolina

I am confident this group of new leaders will continue to fulfil the mission and legacy of our association.

- I will attend the 2022 SASFAA Conference and have the opportunity to moderate one of the sessions.

Respectfully submitted,

Carolyn Sparks
February 11, 2022



Southern Association of Student Financial Aid Administrators

Jeff Norrod / Tennessee President

Executive Board Report / February 2022

LRP and GAP Goal Activity to date:

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:



Southern Association of Student Financial Aid Administrators

Beth Armstrong / Virginia President

Executive Board Report / February 2022

LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

- VASFAA voted to update its bylaws to allow for a bookkeeper;
- Board decided upon and engaged a bookkeeper;
- Board held its winter board meeting at spring conference location, Beachfront Marriott in Virginia Beach
- VASFAA conference to be held April 10-13.
 - Conference committee has done an amazing job;
 - Great video promoting conference;
 - Engaging sessions planned;
 - Awesome partner engagement.
- Winter/spring webinar series taking place.
- President-Elect Joe Dobrota selected June 6-7 for VASFAA Board transition dates.



Southern Association of Student Financial Aid Administrators

Sandy Neel / Special Project – Association Governance

Executive Board Report / February 2022

Committee Members

All are active members of SASFAA

Stephanie Miller, Central Alabama Community College, AL
Runan Evans, Bluegrass Community and Technical College, KY
Brenda McCafferty, ECMC, VA
David Alexander, ECPI University, VA
Michael Morgan, Rhodes College, TN
Cindy May, University of Mississippi, MS

Committee Goals for 2020-2021:

Determine the function of the Association Governance Committee: Develop the committee, determine the combined duties/functions of the committee, determine who should chair the committee, and develop a name that aligns with the duties/functions.

SASFAA LRP and GAP Goal Activity to date:

The committee is finalizing the recommendation for the combined GAP and LRP Committee. The Committee discussed through email the draft of the duties of this Committee and met via Zoom on December 9, 2021 for additional discussions and planning.

The Committee provided suggestions for the Nominations and Elections concern and provided them to Past-President Spiers and President Tulloss.

The Committee is meeting at the Annual Conference on Tuesday February 22, 2022 at 7:30am to review and edit the draft of new combined Committee that will be presented to the Executive Board at the Transition Meeting.

After reviewing this from the **February 16, 2019 Minutes:**

Motion to establish an Association Governance Committee: *Joan made a motion to accept the movement to a comprehensive committee, association governance committee, to include GAP, LRP, By-Laws, & P&P review. The President will assign a task force to assemble all the changes necessary needed to move forward with a vote to the membership. 2019 transition meeting deadline. second. Motion carries.*

The Chair sent this to the current Committee:

As I was reading this again, I decided I needed to look at the By-Laws and Articles of Incorporation to see if a vote from the Membership was necessary. The By-Laws nor the Article of Incorporation list standing Committees. Standing Committees are only found in the P&P. With that said, I do not believe combining the LRP and GAP Committees need to be presented to the membership for approval. I believe this is a P&P change and the Board can approve those changes.

Here is a link to the articles of Incorporation

https://www.sasfaa.org/Resources/Documents/Governing%20Documents/Articles%20of%20Incorporation/SASFAA_A_Articles_of_Incorporation.pdf

Here is a link to the By-Laws https://www.sasfaa.org/resources/Documents/Governing%20Documents/By-Laws/ByLaws_updated_05_04_21.pdf

The Chair heard from two Committee members before this was submitted.

Motion/ Action Item(s):

Nothing at this time

Policy & Procedure: Changes/ Recommendations:

Nothing at this time



**Southern Association of Student Financial Aid Administrators
Shannon Jones/Special Project – Partner Advisory Board
Executive Board Report / February 2022**

Committee Members:

Committee Goals for 2020-2021:

SASFAA LRP and GAP Goal Activity to date:

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:



Site Proposal Request

2020 SASFAA New Aid Officers Workshop

Return on/by: April 30, 2019

Institution Name: **Wofford College**

City, State: **Spartanburg, SC**

Contact Name: **Karlee Tate**

Contact Address: **429 N Church St**
Spartanburg SC 29303

Phone: **864-597-4962**

Email: **tatekm@wofford.edu**

Available Dates: Which dates in May or June 2020 could the institution host SASFAA NAOW?

(Dates should be 8 consecutive days including early arrivals. NAOW usually runs from Friday to Friday.)

6/17-6/24

Does the institution have any camps, or yearly summer events that could interfere with the SASFAA NAOW? **YES** If yes, what is the event(s) and what are the dates?

Athletic camps mainly on the other side of campus.

Sleeping Rooms: We would need up to 125 sleeping rooms (single occupancy bedrooms with no more than 4 individuals sharing a bathroom).

Can your institution accommodate this request? **YES**

If so, please describe the style of rooms and bathrooms (*i.e. Suites with connecting bath, individual rooms with hall bath, etc.*).

We have apartments with 4 individual bathrooms and 2 full bathrooms to share.

In addition, we would need up to 25 rooms for staff and early arrivals. Can your institution accommodate this request? **YES**

What is the sleeping room rate per night? **\$ 26 per person**

Is there a room deposit required? **NO** If yes, how much? \$ _____ When is it due?

What is the Room Cancellation Policy? Attach a separate sheet if needed.

What is the Room Attrition Policy? Attach a separate sheet if needed.

Is there Internet access in sleeping rooms? **YES** If yes, how much is the fee? \$ _____

List any sleeping room amenities such as microwaves, refrigerators, etc.

Linen Service: Can your institution provide linens for sleeping rooms? **No**

If yes, what is the charge/fee per person? \$ _____

Is there a kitchen area available? **YES**

List any kitchen amenities such as microwaves, refrigerators, etc.

Meeting Space: We would need a minimum of 6 classrooms and one staff headquarters in the same building.

Can your institution accommodate this request? **YES**

Is there a charge for meeting/classroom space? **YES**

If yes, what is the meeting/classroom space charge/fee? \$30/day

Are the classrooms set up with desks or tables and chairs? **YES**

Is the furniture in the classrooms movable or stationary? **YES**

Is there AV equipment in each classroom? **YES**

Is there a charge/fee for AV equipment in each classroom?

If yes, how much is the fee? \$

Is there Internet access in meeting rooms? **YES** If yes, how much is the fee?

We would need an auditorium for approximately 125. Can your institution accommodate this request? **YES** If yes, how much is the fee? **\$200**

Is there a stage in the auditorium? **YES**

Is there AV equipment in the auditorium? **YES**

Is there a charge/fee for AV equipment in the auditorium? **NO**

If yes, how much is the fee? \$

Is there Internet access in the auditorium? the fee? **YES** If yes, how much is it? **\$0**

Are keys available for classrooms and auditorium? **NO** If yes, how much is the Deposit/fee? \$

Dining Hall Facilities

Is there an outdoor area for a cookout? **YES**

Does the institution offer a meal plan or are charges per meal or both? **You all can work with AVI directly for pricing details.**

What is the charge per person? \$ What is the charge per meal? \$

Will SASFAA be charged for a meal if we decide to offer attendees a free night off campus?

We would need banquet facilities available for up to 125. Can your institution accommodate this request? If yes, how much is the charge/fee? \$

Is there a Food/ Beverage Minimum? If yes, how much is the minimum?

Are outside caterers permitted on campus? **YES**

Miscellaneous

Is there a registration area available near the sleeping rooms? **YES**

Is there a hospitality room available near the sleeping rooms? **YES**

Is there on-campus parking available? **YES** If yes, what is the rate? **\$0**

Is there a campus shuttle services? **NO** If yes, what is the rate? \$

Is there a charge to post signage on campus? **NO** If yes, how much is the charge? \$

Is there a copy center available on campus? **NO** If yes, how much is the charge per copy? \$

What is the institution's Alcohol Policy? Attach a separate sheet if needed.

Does the institution have luggage carts available? **NO** If yes, how much is the fee? charge/fee? \$

Does the institution have golf carts available? **NO** If yes, how much is the fee? charge/fee? \$

List a few area attractions and the approximate cost.

How close to the campus is the nearest grocery store?

Half a mile

How close to the campus is the nearest convenience/drug store?

Half a mile

List a few nearby restaurants and the price ranges.

How close is the nearest airport to the institution? **20 miles to GSP**

What airlines service your city?

Delta, United, Southwest, American

Please return form to: Michael Birchett, Site Selection Coordinator
Bluegrass Community & Technical College
Classroom Building Suite 103
500 Newtown Pk
Lexington, KY 40508
(859) 246-6744 (phone) (859) 246-4698
(fax) michael.birchett@kctcs.edu

Addendum B



Jacquelyn LeSeuer
Chair
Southern Association of Student Financial Aid Administrators

February 7, 2022

Subject: Request for Proposal – Diversity, Equity and Inclusion Training

Dear Ms. LeSeuer,

The Peace and Justice Institute (PJI) at Valencia College is pleased to provide the Southern Association of Student Financial Aid Administrators (SASFAA) with a proposal for a custom workshop for association members.

PJI's workshops are designed to create a space for engaging in authentic and honest conversations to cultivate a healthy and accountable culture centered on inclusive excellence.

The proposed workshop, Conversations in Inclusiveness, will be delivered to SASFAA members. This workshop will be delivered virtually via Zoom and will last for 2.5 hours. Exact date and time will be established upon further coordination.

Workshop Objectives:

- Apply the Principles for How We Treat Each Other to create a foundation of connection, trust, honesty, and respect.
- Create a safe space for dialogue that nurtures an environment of inclusive excellence, one where collaboration and teamwork are prioritized and a more equitable community is cultivated.
- Create opportunities for self-reflection through small group sharing, individual reflection, and serial testimony.

Workshop Description

In this interactive workshop, participants will be introduced to a set of tools to help them engage in reflective practice and intercultural communication in order to create inclusive excellence in the work environment. Participants will engage in experiential exercises, dialogue, and work with The Principles for How We Treat Each Other. Participants will be introduced to the idea of unconscious bias and be given opportunities in a safe setting to temporarily put aside their own perspectives in order to listen non-judgmentally to the experiences of others. With these new tools in hand, participants will improve their interpersonal relationships, the work environment, and develop practices of respect and community building.

Program Fee Total Fee: \$3,000.00

PEACE AND JUSTICE INSTITUTE

All People. All Voices. All Matter.

In addition to custom curriculum development for and facilitation of these comprehensive workshops, these program fees include qualitative assessments that anonymously capture participant insight and feedback and regular focus group and consultation meetings with leadership from PJI and your organization. These meetings support an evidence-based practice by providing opportunities to debrief workshop experiences and critically analyze how workshops can better meet the needs of your organization. An executive report that summarizes important feedback and key information will also be provided.

The Peace and Justice Institute is prepared to maintain conversation and partnership with SASFAA in an effort to sustain the efforts of these workshops and prepare for further dialogue and development in inclusion, equity, and diversity.

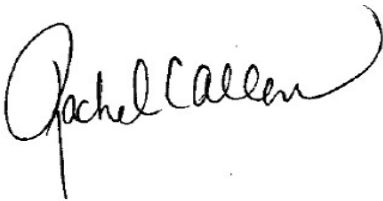
If it is necessary for SASFAA to postpone or cancel the workshop, it is your responsibility to advise the Peace and Justice Institute no less than five (5) business days prior to the program start date.

This Letter of Agreement may be terminated without cause by either party by giving 14 calendar days advance written notice, with confirmed receipt by the other party. The notification will state the effective date of termination.

SASFAA agrees not to solicit or contract directly with PJI consultants, facilitators, or staff without written permission from the Peace and Justice Institute. Please contact me anytime should you have any questions or to request additional information regarding this proposal.

If you agree with the terms and conditions as set forth in this document, please obtain an authorized approval signature, indicating acceptance and return to the undersigned. PJI values this opportunity to submit this proposal on a most important initiative with the Southern Association of Student Financial Aid Administrators.

Sincerely,



Director, Peace and Justice Institute 407-582-2709

Authorized Approver:

Name

Print

Title

Date