

Southern Association  
of Student Financial  
Aid Administrators  
October 2022



Agenda and  
Board Reports

Prepared by Secretary Nicole Patrick

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**AGENDA**  
**SASFAA Board Meeting**  
**October 8, 2022**  
**Chattanooga, Tennessee**

**Friday, October 7**

**Travel Day**

**6:30 PM**

**Dinner**

**The Feed Table & Tavern**

**Saturday, October 8**

**7:45-8:45 AM**

**Continental Breakfast**

**Plaza A**

**9:00 AM**

**Board Meeting**

**Plaza A**

Call to Order

**Michael Morgan**

Roll Call / Establish a Quorum

**Nicole Patrick**

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

Welcome to Tennessee

**Charles Harper**

Motion/Action Items

**Michael Morgan**

**Action Item: Approval of minutes of July 27, 2022 meeting of the board.**

**Action Item: Approval of minutes of August 18, 2022 e-meeting of the board.**

**Action Item: Approval of 2022-2023 Committee Members**

**Jenelle Handcox**

**Action Item: In the form of a motion from the committee, the Conference Committee would like to recommend that the 2022-2023 Conference Fee be the following:**

**Stephanie Miller**

- 275.00 Early Bird Full Conference Fee PAID Registration through December 15, 2022
- 300.00 Regular Full Conference Fee Registration starting December 16, 2022
- 150.00 Early Bird Daily Conference Fee PAID Registration through December 15, 2022.
- 164.00 Regular Daily Conference Fee Registration starting December 16, 2022.

**In review of other regional conference fees, the committee feels that we are assisting our schools with the early bird and increasing the regular rate is within the standard fee rates.**

- MASFAA 300.00
- SWASFAA 300.00
- EASFAA 375.00

*For the future, the conference committee should consider raising the fee to cover the increase in food, AV, etc costs in July. Due to discussion, it was felt that we would not change the rates this year due to budgets at schools already in place using the previous conference fee to continue with the same fee for Early Bird paid registration.*

*\*It is estimated that the food and beverage for 300.00 people will be over 112,000. 112,000/300 = 373.33. The fees, we know, will not cover the expenses.*

**Action Item:** Present 2022-2023 Sponsorship Opportunities to the Executive Board for immediate approval. **Geoff Stam**

- Includes changes to pricing for suggested tiers

- Includes additional "opportunities" outside of conference activities

Distribute "approved" Sponsorship Menu to the Business Partners to secure commitments for sponsor levels/opportunities.

	Round of Successes (2-3 minutes each)	All
<b>12:00 PM</b>	<b>Lunch</b>	<b>TBD</b>
	New Business	<b>Michael Morgan</b>
	Old Business	<b>Michael Morgan</b>
<b>1:00 PM</b>	<b>Tour of facility</b>	
	Adjournment	<b>Michael Morgan</b>



**Southern Association of Student Financial Aid Administrators**

**Michael D. Morgan / SASFAA President**

**Executive Board Report/October 2022**

**Executive Board**

**Goals for 2022-2023:**

The goals for this year were birthed out of the discussion and interaction during the transition meeting and the recognition of the importance of reflection and to move forward boldly. Organizations such as SASFAA must ask what value we provide that we might...

- Increased attendance at annual conference
- Increase membership and volunteerism
- Increase sponsorship
- Increase collaboration opportunities between states and region

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

None at this time

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

None at this time

**Activity Summary:**

Attended NASFAA Board meetings as an observer

Attended SCASFAA Conference in Hilton Head, SC, October 16 – 19, 2022

Attending NCASFAA Conference in Charlotte, October 23-26,2022

Met with multiple committee chairs to discuss plans for 2223

- Program Committee
- Legislative Concerns



**Southern Association of Student Financial Aid Administrators**

**Daniel T. Barkowitz, President-Elect**

**Executive Board Report / October 2022**

**Committee Members**

- Conference Co-Chairs for 2024: Melanie Gillespie (SC) and Gail Muse-Beggs (AL)
- Working on names for other roles for 2023-24 year

**Committee Goals for 2022-2023:**

- My main goal this year is to support President Morgan in realizing his vision for the association.
- I will also work to create a sense of community among the Presidents-Elect for the SASFAA states to ensure a speedy transition in July 2023.
- I will begin planning for 2023-24 year, including setting theme, working on conference planning and event planning and logistics.
- I will be involved in the Association Governance and Strategic Planning Committee.
- I will represent SASFAA at various events throughout the year including several state conferences, NASFAA Leadership Conference, and the NASFAA Conference.
- I will work on establishing a draft budget for 2023-24 for review by the Board and Budget Chair.
- In consultation with the President and Past President, I will complete any other tasks as assigned.
- Complete a thorough review of the Policy and Procedures Manual to ensure that current practices are reflected in the document.

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

- Under Goal 4 (The SASFAA Board of Directors (elected and appointed) should be reflective of the diversity of the organization, be knowledgeable financial aid practitioners, Involved, engaged and committed to the success of the organization):
  - Established the SASFAA President-Elect State Swap schedule
  - Reached out to all 9 state presidents-elect to encourage community building among the group.

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

None

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

None

**Activity Summary:**

- Selected Conference Co-Chairs for 2024 Conference.
- Worked with Site Coordinator to begin focusing on site locations for 2024 conference.
- Reached out to 9 state presidents-elect to determine conference schedule for 2022-23 and to establish state swap schedule.
- Shared state swap schedule with the current state presidents
- Will be attending CNAR (College Needs Analysis Roundtable) in October, and serving on College Board's Higher Ed Colloquium Planning Committee from 2022-25.
- \*NEW – Serving as instructor for SASFAA's Management Institute with a presentation with Phillip Hawkins on Work/Life Balance
- \*NEW – Worked on identifying all possible membership institutions for our 9 states and the CFOs, DFAs, and Presidents of each school for possible outreach to all.
- \*NEW – Assisting with changes to Website as needed
- \*NEW – Serving as member of FASFAA's Fiscal Affairs Committee
- \*NEW – Presented on upcoming FAFSA changes to all Florida High School guidance officers (two virtual presentations co-sponsored by Florida College Access Network, FASFAA, and Florida High School Counselor Association) and to Florida Philanthropic Network (FPN) Innovation Scholarship Working Group.

**Submitted with gratitude,**

DANIEL T. BARKOWITZ



**Southern Association of Student Financial Aid Administrators**

**Celena Tulloss / Past President**

**Executive Board Report/October 2022**

**Committee Members:** Nominations and Elections/Awards- Dr. Jim Theeuwes  
Katie Conrad  
Angela Tate  
Rhonda Bryant  
Megan Smith  
Zilma Lopes  
Carolyn Sparks  
Jeff Norrod  
Beth Armstrong

**Committee Goals for 2022-2023:**

- Solicit nominations and present a full slate of candidates for the SASFAA election
- Solicit award nominations and present to the Board
- Continue work on position descriptions for Board approval

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

- Continued work on position descriptions
- Created a SASFAA Past President Facebook group
- Sent the Call for Nominations and Awards to the SASFAA membership

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

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

**Activity Summary:**

- Attended the NASFAA Board Meeting June 25-26, 2022 to transition from Observer to Regional Representative
- Attended the Regional Presidents Meeting facilitated by NASFAA via Zoom, August 11, 2022
- Attended the NASFAA briefing on loan forgiveness via Zoom, August 24, 2022
- Attended the NASFAA Board Meeting via Zoom, September 16, 2022





**Southern Association of Student Financial Aid Administrators**

**Leigh Ann Hussey / Vice President**

**Executive Board Report/October 2022**

**Committee Members**

Management Institute – Sandy Neel (Chair), Kathy Bialk, Heather Boutell, Michael Gantt  
New Aid Officer Workshop – Katie Conrad (Curriculum Coordinator)  
Director’s Summit – David Alexander (Chair)  
Webinar – Zilma Lopes (Chair)

**Committee Goals for 2022-2023:**

Host a Management Institute in October  
Host 2 pre-conference workshops (Director’s Summit and a NASFAA credential)  
Host the New Aid Officer Workshop in June  
Host 4 to 6 webinars

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

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

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

None at this time

**Activity Summary:**

Discussions have already begun for NAOW 2023. The dates will be June 4 – 9. We are currently working with Wofford College again to get an official proposal from them. At this time, we anticipate them raising the price of meals by 35 cents a meal to \$5.00 for breakfast, \$7.10 for lunch, and \$7.85 for dinner. At the time of this submission, we do not yet have an estimated room cost, but we have been informed that it will likely be similar to the meal increase. Last year’s housing cost was \$26 per person per night. As a reference – the total payment to Wofford last year was \$32,132.31 (\$13,618.31 for food; \$18,514 for housing and classroom space). Zilma Lopes has been hard at work getting together the first webinar and looking forward towards future webinars. At this time, she is working with NASFAA and 2 SASFAA member institutions for a Fresh Start webinar.

Plans are moving forward regarding pre-conference workshops for the 2023 SASFAA Conference. Leigh Ann met with Dameion Lovett and Jacqueline Barnes regarding preparations for a Diversity, Equity, and Inclusion session. David Alexander has already started assembling a team for the Director’s Summit. We will also have a NASFAA credential session that has yet to be determined.



**Southern Association of Student Financial Aid Administrators**

**Nicole Patrick/ Secretary**

**Executive Board Report / October 2022**

**Committee Members**

Sarah Dowd

Nancy Ferguson

**Committee Goals for 2022-2023:**

- \*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
- \*Set up rules of engagement, confidentiality agreement, and conflict of interest forms for electronic submission

**SASFAA 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**

**Sarah Baumhoff/ Treasurer**

**Executive Board Report / October 2022**

**Committee Goals for 2022-2023:**

- Ensure that the Guide To Financial Management has been updated in all sections for the Treasurer and Bookkeeper
- Ensure that the roles have been clearly defined for the Treasurer and Bookkeeper
- Ensure the website is updated with all needed information
- Work closely with Budget and Finance

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

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

None

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

None at this time.

**Activity Summary:**

- Worked with Site Selection Chair to ensure credit applications were submitted for Chattanooga Meeting Site and Conference Location
- Contacted Accountant about completing tax returns
- Worked with Bookkeeper to ensure annual licenses had been updated and paid
- Conversations with Truist about best way to update account with new signers and resolving Credit Cards issued to those who are eligible are ongoing. Will hopefully be resolved by the end of October.



**Southern Association of Student Financial Aid Administrators**

**Jenelle L. Handcox/ Budget and Finance Committee Chair**

**Executive Board Report/October 2022**

**Committee Members**

- Proposed Committee Members

Ayers, Bill	Lender	Florida
Buchanan, Amanda	4 Year Public	North Carolina
Dill, Marian	4 Year Private non-profit	Tennessee
Sartini, Chad	4 Year Public	Virginia
Walton, Arlisha	4 Year Private non-profit	Mississippi
Woodous, Keisha	4 Year Public	Virginia

**Committee Goals for 2022-2023:**

- Assist President in preparing and monitoring zero-based budget
- Assist President and Treasurer with financial oversight
- Refine/define the duties and responsibilities between the Treasurer and Bookkeeper to ensure that both positions remain relevant to the Association in terms of workload and service to SASFAA

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

- Initial 2223 operating budget has been approved
- Initial 2223 operating budget provided to Electronic Services Chair for posting to website

**Allocation of Assets:** See balance sheet below

Operating Funds (15-25% target) – Bank Accounts	\$ 165,648.14	Currently 16.1%
Short Term (30-45% target) – Advisory Solutions	\$ 468,580.88	Currently 45.4%
Long Term (30-45% target) – Charles Schwab	\$ 396,440.61	Currently 38.4%

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

**Discretionary Funds:**

Current Assets (including bank accounts)	\$ 1,030,670
Prior Year Ending Budget	\$ 297,046
Outstanding Contractual Agreements	\$ 248,110
Balance	\$ 485,514
20% maximum transfer from assets	\$ 97,103

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

- Were the Policy & Procedure Changes proposed during past Executive Board meeting by prior Chair Marian Dill approved and added to SASFAA P&P Manual and Guide to Financial Management?
  - P&P 10.6.8 State Presidential Exchange (Travel to State Conference)
  - GFM Section 9.3 External Audit
- Approval of 2022-2023 Committee Members

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

- None to report

**Activity Summary:**

- Truist and Zelle conducted a system update in late July. All previously saved Zelle recipients were lost during the upgrade. If you prefer to receive reimbursements via Zelle, you must provide email address or cell phone number to Jeff Dennis.
- Officer names, contact information and signatures updated with Edward Jones and Charles Schwab.
- Monthly detailed expense reports are scheduled on the 20<sup>th</sup> of each month. Elected Officers and Committee Chairs will receive this information via email throughout the fiscal year. The emails are auto-generated with SASFAA as the sender. Officers and Chairs should review the reports monthly and inform me of any discrepancies.
- Monthly Budget vs. Actuals reports are scheduled on the 16<sup>th</sup> of each month. All Executive Board members will receive this information via email throughout the fiscal year. Board members should review the report in order to serve as diligent stewards of the dollars entrusted to you.

**Outstanding Contractual Obligations:**

- **Chattanooga Marriott Downtown**, Management Institute, Board Meeting and Conference Committee, 10/05/2022 – 10/09/2022
  - Room rate is \$169 plus 17.25%
  - 125 contracted room nights
  - \$3,000 banquet food and beverage minimum
  - \$10 rebate per room, per night will be credited to the master account
  - 1/40 complimentary room ratio
  - Meeting room rental fees waived
  - One upgrade to an Executive King at the group rate
  - Complimentary access to fitness center & pool deck with room key
  - Complimentary basic Wi-Fi in guest rooms & meeting space
  - Group rate available 3 days pre/post subject to availability
  - Attrition at 80%
  - Marriott Reward points for designated official

**Total liability: \$26,625**

- **Chattanooga Marriott Downtown**, Annual Conference, 2/10/2023 – 2/15/2023, \$166,950
  - Room rate is \$169 plus 17.25%
  - 1050 contracted room nights
  - \$0 banquet food and beverage minimum
  - \$10 rebate per room, per night will be credited to the master account
  - 1/40 complimentary room ratio

- Meeting room rental fees waived
- Complimentary Presidential Suite during contract dates
- Complimentary Governor's Suite during contract dates
- M Club upgrade & VIP amenities to 10 guests
- Complimentary access to fitness center & pool deck with room key
- Complimentary basic Wi-Fi in guest rooms & meeting space
- Allowed to bring our own AV equipment with no additional fee
- Group rate available 3 days pre/post subject to availability
- Self-parking discounted to \$10 per night
- Attrition at 80%
- Marriott Reward points for designated official

**Total liability: \$166,950**

- **Chattanooga Convention Center**, Annual Conference, 2/12/2023 – 2/15/2023
  - Complimentary Wi-Fi
  - \$40,000 food and beverage minimum
  - If food and beverage revenue is at least \$60,000, space rental discounted by 50%
  - \$1500 non-refundable deposit paid in July 2022

**Total liability: \$14,535**

- **Levy Premium Foodservice**, Annual Conference, 2/12/2023 – 2/15/2023
  - Exclusive food and beverage provider for the Chattanooga Convention Center
  - \$40,000 food and beverage minimum

**Total liability: \$40,000**

**Balance Sheet:**

- The Balance Sheet as of September 29, 2022 is provided below:

# Southern Association of Student Financial Aid Administrators

## Balance Sheet

As of September 29, 2022

	TOTAL
<b>ASSETS</b>	
Current Assets	
Bank Accounts	
2 BB&T Checking-ACH Only	100.00
BB&T Checking	114,812.61
BB&T Checking-closed Jan 2019	0.00
BB&T Savings	47,917.98
Edward Jones-Money Market	2,817.55
<b>Total Bank Accounts</b>	<b>\$165,648.14</b>
Accounts Receivable	
Accounts Receivable	0.00
<b>Total Accounts Receivable</b>	<b>\$0.00</b>
Other Current Assets	
Advisory Solutions 20/80 @ Edward Jones	468,580.88
Charles Schwab (NASFAA)	396,440.61
Undeposited Funds	0.00
<b>Total Other Current Assets</b>	<b>\$865,021.49</b>
<b>Total Current Assets</b>	<b>\$1,030,669.63</b>
<b>TOTAL ASSETS</b>	<b>\$1,030,669.63</b>
<b>LIABILITIES AND EQUITY</b>	
Liabilities	
<b>Total Liabilities</b>	
Equity	
Opening Balance Equity	757,980.87
Retained Earnings	246,090.64
Net Income	26,598.12
<b>Total Equity</b>	<b>\$1,030,669.63</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$1,030,669.63</b>

Cash Basis Thursday, September 29, 2022 08:52 AM GMT-04:00



## Southern Association of Student Financial Aid Administrators

Stephanie Miller – Conference Committee Chair

Executive Board Report/October 2022

### Committee Members

- AL: Gail Beggs, Coastal Alabama Community College (2-year, public) - 2024 Conference Co-Chair
- AL: Audrey White, University of Alabama Birmingham (4-year, graduate, public)
- FL: Dameion Lovett, University South Florida (4-year, graduate, public)
- GA: Aria Simmons, Georgia State University (4-year, graduate, public)
- KY: Michelle Standridge, Spalding University (4-year, private)
- MS: Jacquelyn LeSueur, Mississippi State University (4-year, public) - SASFAA Global Issues Chair
- NC: Zilma Lopes, Robeson Community College (2-year, public) New
- SC: Melanie Gillespie, Tri-County Technical College (2-year, public) - 2024 Conference Co-Chair
- TN: Reed Allison, Chattanooga State Community College (2-year, public) - 2023 Conference Local Arrangements
- TN: Amy Wood, Tennessee State University (4-year, public, HBCU)
- VA: Chad Sartini, Virginia Tech (4-year, graduate, public)
- Conference Chair: Stephanie Miller. Central Alabama Community College (2-year, public)
- Ex-officio Committee Members (Conference Handbook Section 3 & Policy & Procedure 11.1.4):
  - Treasurer: Sarah Baumhoff (Policy & Procedure: 5.5.7)
  - Sponsorship Chair: Geoffrey Stam
  - Membership Chair: Zachary Christian
- Ad Hoc Committee Members (Conference Handbook Section 3):
  - President: Michael Morgan (Policy & Procedure: 5.2.4)
  - Vice President: Leigh Ann Hussey (Policy & Procedure: 5.4.4)
  - Global issues Chair: Jacquelyn LeSueur
  - Electronic Services Chair: Jennifer Davis (Policy & Procedure: 6.5.3)
  - Site Selection Chair: Joan Bailey
  - Conference Chair-Elect: Gail Beggs & Melanie Gillespie
  - Local Arrangements: Reed Allison
  - Business Partner Liaison: Brenda Brown

### Committee Goals for 2022-2023:

#### **Policy & Procedure: 6.6**

The Conference Committee plans the Association's annual conference that includes training, professional development and networking activities. To achieve these goals, the committee will:

- coordinate conference activities with the professional advancement, Budget and Finance, Membership and Local Arrangements Committees;
- solicit proposals to develop general and interest sessions and secure speakers that appeal to the various sectors and experience levels of the membership;



- review evaluations from the prior year conference to assess interest and need for appropriate adjustments for current conference plans;
- plan pre-conference workshops and seminars that address the needs of different segments of the membership;
- assist in developing the conference budget and adhere to the approved budget;
- secure volunteers to help perform the duties of the committees;
- maintain all related correspondence and materials; (8) prepare a conference evaluation for use by the next conference chair;
- provide conference announcements, news articles and promotional materials to the Communications and Outreach committee for publication to the membership;
- report on activities and present reports to the Board

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

- **Section 1:**
  - **The elected board and committee chairs shall continuously review P&P.**
  - **Board and Committees chairs shall document their review of the P&P**
    - Reviewed the P&P – Completed 06/15/2022
  - **All efforts should be made to fully vet members who are considered for committees.**
  - **Provide for the needs of all sectors.**
    - Selected committee members from a variety of sectors to provide to the Executive Board for voting and approved at the July Board Meeting 07/27/2022-07/28/2022
    - Conference session selection will assist in providing information and resources to all sectors
  - **Provide services and resources that meet the needs of all sectors.**
    - Conference session selection will assist in providing information and resources to all sectors

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

- In the form of a motion from the committee, the Conference Committee would like to recommend that the 2022-2023 Conference Fee be the following:
  - 275.00 Early Bird Full Conference Fee PAID Registration through December 15, 2022
  - 300.00 Regular Full Conference Fee Registration starting December 16, 2022
  - 150.00 Early Bird Daily Conference Fee PAID Registration through December 15, 2022.
  - 164.00 Regular Daily Conference Fee Registration starting December 16, 2022.
- In review of other regional conference fees, the committee feels that we are assisting our schools with the early bird and increasing the regular rate is within the standard fee rates.
  - MASFAA 300.00
  - SWASFAA 300.00
  - EASFAA 375.00
- For the future, the conference committee should consider raising the fee to cover the increase in food, AV, etc costs in July. Due to discussion, it was felt that we would not change the rates this year due to budgets at schools already in place using the previous conference fee to continue with the same fee for Early Bird paid registration.
  - It is estimated that the food and beverage for 300.00 people will be over 112,000.  $112,000/300 = 373.33$ . The fees, we know, will not cover the expenses.

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

- The Conference Committee would like to recommend that the Conference Handbook reflect that the President chooses the charity keeping in mind the location of the conference.
- 

**Activity Summary:**

- The committee has met each month on the last Monday of the Month since August.
- Sessions are currently being finalized.
- ED confirmed that Arva Thomas will be in person. We are still waiting on David Bartnicki.
- Conference Registration should go live after the October Board meeting.



## Southern Association of Student Financial Aid Administrators

Geoff Stam / Sponsorship Chair

Executive Board Report/October 2022

### **Committee Members**

Geoff Stam, Dir Default Management, Keiser University  
Shannon Jones, AVP, Business Development, Inceptia  
Laura Dickerson, Director, Relationship Management Sallie Mae  
Ashley Edens, Assistant VP of College Partnerships, College Raptor  
Michael Spienza, Director of Financial Aid & Scholarships, Anderson University  
Brenda Brown, College Aid Services

### **Committee Goals for 2022-2023:**

In collaboration with the Special Projects Chair (Business Partner Liaison), will contribute to meeting our 2022-23 goals:

- Increase attendance at annual conference
  - Support the Conference Committee with 60<sup>th</sup> Anniversary celebration.
  - Cultivate business partners to contribute to the annual conference success.
- Increase Membership and Volunteerism
  - Provide Value of Membership – Growing the “WE” culture! Business Partner members are valued as members and can volunteer and contribute in the same manner as institutions.
  - Collaborating with the other SASFAA Committees to cultivate connections to SASFAA Legacy – former leaders and members that have retired or are not as active in the association.
  - Creation of Business Partner presence on the SASFAA website
- Increase Sponsorship
  - Develop partnerships for repeat and new sponsorships to support SASFAA professional development opportunities and events
  - Redesign of the Business Partner Services Directory
- Increase collaboration opportunities between state and region
  - Utilize state sponsorship or business partner liaisons in committee

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

Reached out to potential Committee members, secured responses regarding volunteering for work on the committee. Notified President Morgan of the suggested members and provided the list for confirmation and Board approval.

Updated/Edited the menu of Sponsorship Opportunities; collaborated with the Special Projects Chair and Conference Chair to confirm conference options. Presented options to the conference committee and received verbal approval to present to the Board for approval and distribution to Business Partners.

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

Present 2022-2023 Sponsorship Opportunities to the Executive Board for immediate approval.  
- Includes changes to pricing for suggested tiers

- Includes additional “opportunities” outside of conference activities  
 Distribute “approved” Sponsorship Menu to the Business Partners to secure commitments for sponsor levels/opportunities.

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

**Activity Summary**

Welcome back! We are excited to announce that the SASFAA 2023 Conference will be held in person, February 12-15, 2023, at the Chattanooga Marriott and Convention Center in Chattanooga, Tennessee. SASFAA is pleased to offer our colleagues in the business sector the opportunity to support our training efforts as financial aid professionals.

Please feel free to review the list of 2022-2023 Sponsorship Options to determine how to best partner with SASFAA this year. If interested, please complete an online sponsorship registration. We will follow up with an email message confirming your sponsorship choice(s) and then provide an invoice.

For those of you who have sponsored in the past or plan to sponsor this year, thank you for supporting SASFAA's mission. Your sponsorship is invaluable. Without your support, we would not have such an array of professional development opportunities to provide to our financial aid administrators. With travel and budgets impacted by COVID-19, our Association is depending upon you now more than ever.

Please [contact us](#) with any questions or concerns.

## **Register Here**

Leadership Level \$5,000	Advocacy Level \$3,500	Support Level \$2,000	Benefits
2	1	1	Exhibit Booth Space(s) - Priority Placement by Date
2	2	1	Complementary Conference Registration
+	+	+	Attendees must be paid SASFAA members
+	+	+	Organizational Logo on Conference Information Page
+	+	+	Proposed Meal Card Support
+	+	+	Inclusion in Product and Services Directory
+	+	+	Online Conference Support Recognition
+	+	+	List of Registrants 2 weeks before the Annual Conference
+	+	+	Sponsorship Recognition at Conference
+	+		SASFAA Director's Forum Admission
+	+		Web Banner Ad on Web Site
Full Page	1/2 Page		Ad in Conference Program
Full Page	1/2 Page		Ad in New Aid Officers Workshop Program

+			Recognition at SASFAA Workshops and Professional Development Events
+			General Session Moderator
+			Ad in the Directors Summit program

## A-La-Carte Options

### Advertising Combo Package \$600

- You do not need to be a conference exhibitor for this option
- Web Banner Ad on SASFAA Website
- Includes 1/2 page ad in New Aid Officers Workshop Program

### Printing of Business Partner Service Directory \$500

- You do not need to be a conference exhibitor for this option

### Conference “Relaxation” Booth Items \$500

- Must be a conference exhibitor
- The sponsor will be recognized with signage at the event

### SASFAA Special Projects (“SASFAA Speaks/Legacy”) \$500

- You do not need to be a conference exhibitor for this option
- Web Banner Ad on SASFAA Website
- Additional special recognition will be given at any general sessions offered each day
- Includes 1/2 page ad in New Aid Officers Workshop Program

### President's Welcome Reception \$1,500

- Must be a conference exhibitor
- The sponsor will be recognized with signage at the event
  - Special recognition will be given at the event
  - Space is open to the first 4 commitments. Those wishing to purchase this opportunity will be honored in order of the date the web-based sponsor form is completed.

### Continental Breakfast \$500

- Must be a conference exhibitor
- Sponsor will be recognized with signage where food is being served
- Additional special recognition will be given at any general sessions offered each day

- Space is open to the first 4 commitments. Those wishing to purchase this opportunity will be honored in order of the date the web-based sponsor form is completed

### **Tuesday's Award Luncheon \$1,000**

- Must be a conference exhibitor
- Sponsor will be recognized with signage where food is being served
- Special recognition at the event
- Space is open to the first 2 commitments. Those wishing to purchase this opportunity will be honored in order of the date the web-based sponsor form is completed.

### **Entertainment Sponsor \$1,500**

- Must be a conference exhibitor
- The sponsor will be recognized with signage at the event
- Special recognition will be given at the event
- Space is open to the first 4 commitments. Those wishing to purchase this opportunity will be honored in order of the date the web-based sponsor form is completed.

### **Other Sponsorship for Training Events or Opportunities (general sponsorship contributions will support the SASFAA event (i.e., meals, reception, entertainment, speakers, technology, printing, etc.)**

- **General Sponsorship Training Events Other Than Conference (no exhibit booth) \$500**
  - Ad in event program
  - Special recognition will be given at the event
- **Directors Summit (Pre-Conference Workshop) General Sponsorship \$400**
  - Ad in event program
  - Special recognition will be given at the event
  - 1 pass to attend, networking opportunity with attendees
- **New Aid Officers Workshop General Sponsorship \$300**
  - Ad in event program
  - Special recognition will be given at the event

## **Benefit Descriptions**

## **Conference Registration List Before Conference Begins**

Approximately 2 weeks before the beginning of the conference, we will provide you with a list of registered conference attendees. We will provide you with an updated list the day before the conference and will provide one final update after the conference.

## **Organization Logo on Conference Information Page**

There will be a prominent display of our sponsorship partners' logos on the main conference information page. This site receives a high amount of traffic in the weeks and months preceding the conference as information is published and updated.

## **Sponsorship Recognition During Conference**

At various times throughout the conference, we will recognize our sponsors.

## **Inclusion in Products and Services Directory**

Newly launched in 2020-2021 and continued for the 2022-2023 academic year, SASFAA has a Business Partners Products and Services Directory.

This directory allows SASFAA Members to shop for various products and services by topic of interest. For example, if your services include third-party FAFSA verification services, as a 2022-2023 sponsorship partner your business would be included with any other 2022-2023 SASFAA sponsorship partners under "Third-Party Verification Services".

## **Complimentary Conference Registration(s)**

Conference registrations will be waived for up to the number of persons included in your sponsorship level.

## **Access to SASFAA Directors Forum (confirm)**

During the 2022-2023 academic year, SASFAA will host a Director's Forum where director-level decision makers will be invited to discuss obstacles and challenges within the profession and share best practices and solutions with colleagues. Depending on your sponsorship level, you may be able to join and participate in the forum.

## **% Page Ad New Aid Officers Workshop**

This is the percentage of a full page for which you will have the opportunity to submit an advertisement within the materials of the given event.

## **% Page Ad Conference**

This is the percentage of a full page for which you will have the opportunity to submit an advertisement within the materials of the given event.

## **Website Web Banner Ad**

This is the rotating banner ad rotator on the main SASFAA website that is active throughout the sponsorship year.

## **Recognition at All SASFAA Events**

Leadership Level sponsors will be recognized at all official SASFAA events.

## **General Session Moderator**

Leadership Level sponsors will be allowed the opportunity to moderate a general session event. Priority for general session selection will be given according to the date of sponsorship payment.

**[Register Here](#)** (LINK???)





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

- **No report submitted.**



**Southern Association of Student Financial Aid Administrators**

**Jennifer Davis / Electronic Services Chair**

**Executive Board Report/October 2022**

**Committee Members**

Loretta Jones, Missy Perry, Chad Sartini

**Committee Goals for 2022-2023:**

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

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

- Working to include step-by-step instructions for general areas of the website (to include screenshots)

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

- None

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

- None

**Activity Summary:**

- Updated the 2022/2023 Board section of the website
- Published the Management Institute registration page
- Sent emails about the conference
- SASFAA Zoom account was renewed through September 2023
- Started the update for the 2023 conference registration and will make it live when directed



**Southern Association of Student Financial Aid Administrators**

**Wayne Kruger/ Legislative Relations Committee**

**Executive Board Report / October 2022**

**Committee Members:** green are fully paid, yellow pending will confirm before finalizing their participation.

Chair: Wayne Kruger, St. Petersburg College

Alabama: Stephanie Miller, CACC

Florida: Johnathan Reynolds, Ultimate Medical Academy

Georgia: Joe Buckholz, Campus Logic

Kentucky: Erin Klarer, Kentucky Higher Education Loan Commission

Mississippi: Nicole Patrick, Mississippi University for Women

North Carolina: Valerie Clem-Brown, William Peace University

South Carolina: Joey Derrick, University of South Carolina

Tennessee: Ron Gambill, Ed South

Virginia: Laurie Owens, Virginia Community College System

At Large: OPEN

At Large: OPEN

**Committee Goals for 2022-2023:** Subject to change/addition after committee meets

1. Continue to update and keep the membership informed as to legislative actions
2. Produce a webinar/conference session on how to navigate legislative actions and how to get involved including responding to NPRM's, contacting members of congress, and more.
3. Plan a potential small hill visit to target congressional members from SAFAA states
4. Work with states to do an outreach at the state level for congressional member
5. Continue to push members to respond to NPRM's that are being released.
6. Create a quick reference/ how to document navigating NPRM's, contacting congressional members, and more.
7. Create SASFAA position papers on upcoming changes

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

GOAL: Committees should represent the mosaic abilities of the membership.

GOAL: Disseminate information to the membership and appropriate constituencies.

GOAL: Foster collaborative training opportunities among member states, sister regional organizations and NASFAA.

GOAL: Educate membership on legislative advocacy.

GOAL: Provide opportunities for legislative advocacy.

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

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

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

**Policy & Procedure: Changes/ Recommendations:** None currently.

**Activity Summary:**

1. Continue to update and keep the membership informed as to legislative actions
  - a. Continued weekly legislative update emails to the membership
  - b. Set up monthly meetings with the committee
  - c. Held two meetings with the committee to get updates from the states, to plan and discuss updates to yearly goals.
2. Continue to push members to respond to NPRM's that are being released.
  - a. Sent out a notification to the membership to read and respond to the NPRM on updated gender and sex questions on the FAFSA application.
3. Work with states to do an outreach at the state level for congressional member
  - a. Shared updated activities from each state
  - b. Started to work on the idea of a coordinated effort for 10-23 to have all states and region make October FAFSA awareness month and get proclamations from all the states.



**Southern Association of Student Financial Aid Administrators**

**Zachary Christian/ Membership Chair**

**Executive Board Report / October 2022**

**Committee Members:**

In process of finalizing committee.

**Committee Goals for 2022-2023:** 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; complete all recommendations from GAP

**SASFAA LRP and GAP Goal Activity to date:** Section I, Membership (Increase Membership); Section 1, Committees (Ensured all committee members are active members of SASFAA).

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

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

**Activity Summary:** Cleaning up backend of membership database – ONGOING; Assisted members with the renewal process, ensuring invoices and membership certificates are providing as requested – ONGOING; Working closely with Book Keeper to ensure payments are being applied to the correct Membership Year for members that did not renew last year (a wild apricot quirk applies payment first to past years that someone was lapsed in, before applying to the current active membership year) -ONGOING; Provided each committee chair with the results of the volunteer survey – COMPLETED; working on soliciting volunteers for Membership Committee to assist with increasing membership between now and early spring – understanding the majority of new members and renewals come in around Conference time, but wishing to increase membership and express value of SASFAA membership beyond the ability to register for and attend Annual conference – ONGOING.

**2022-2023 Membership Data (As of October 5, 2022):**

	<b><u>2021-2022</u></b>	<b><u>2022-2023</u></b>	<b><u>%Change</u></b>	<b><u>Number Change</u></b>
Active	1246	863	-30.74%	-383
Associate	10	10	0.00%	0
Honorary	19	20	5.26%	1
Retired	0	0	0.00%	0
<b><u>Total</u></b>	<b><u>1275</u></b>	<b><u>893</u></b>	<b><u>-29.96%</u></b>	<b><u>-382</u></b>
				0
Alabama	128	53	-58.59%	-75
Florida	149	153	2.68%	4
Georgia	242	154	-36.36%	-88
Kentucky	62	45	-27.42%	-17

Mississippi	52	36	-30.77%	-16
North Carolina	132	78	-40.91%	-54
South Carolina	184	139	-24.46%	-45
Tennessee	120	93	-22.50%	-27
Virginia	136	101	-25.74%	-35
Other	70	41	-41.43%	-29
<b>Total</b>	<b>1275</b>	<b>893</b>	-29.96%	-382
				0
Public (4 Year)	403	290	-28.04%	-113
Private non-profit (4 Year)	326	244	-25.15%	-82
Public (2 Year)	303	180	-40.59%	-123
Other	50	30	-40.00%	-20
Graduate/Professional	31	25	-19.35%	-6
Government Agency	19	13	-31.58%	-6
Lender	30	23	-23.33%	-7
Consultant	18	20	11.11%	2
Guaranty Agency	10	10	0.00%	0
Servicer	13	5	-61.54%	-8
Private non-profit (2 Year)	21	22	4.76%	1
Not Specified	14	5	-64.29%	-9
Private for profit (Business School)	6	5	-16.67%	-1
Private for profit (Technical/Trade)	23	10	-56.52%	-13
Secondary Market	2	2	0.00%	0
Retired Financial Aid Professional	5	8	60.00%	3
Health Related/Nursing	1	1	0.00%	0
<b>Total</b>	<b>1275</b>	<b>893</b>	-29.96%	-382
				0
Male	289	202	-30.10%	-87
Female	926	645	-30.35%	-281
Not Specified	60	46	-23.33%	-14
<b>Total</b>	<b>1275</b>	<b>893</b>	-29.96%	-382
				0
White/Caucasian	754	533	-29.31%	-221
Black/African American	345	230	-33.33%	-115
Not Specified	108	75	-30.56%	-33
Hispanic/Chicano/Mexican American	44	40	-9.09%	-4
Asian/Pacific Islander/Filipino	22	14	-36.36%	-8
Native American	2	1	-50.00%	-1
<b>Total</b>	<b>1275</b>	<b>893</b>	-29.96%	-382
As of date:	6/30/2022	10/5/2022		



## **Southern Association of Student Financial Aid Administrators**

**Joan Bailey/ Site Selection Chair**

**Executive Board Report / October 2022**

### **Committee Members**

- Terrell Robertson – 2yr public -male (black/african american) VA
- Ashley Lowe – 4yr public – female (white/caucasian) – AL
- Katherine Stroup – 4yr public – female (white/caucasian) – MS
- Irma Molinares – Business partner – Female (hispanic) - FL

### **Committee Goals for 2022-2023:**

- 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 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
  - Conference Committee Meeting
  - Annual conference -2024
  - Board meetings 2022-2023
  - Transition meeting 2023

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

- Finalize and close out affairs with 2022 conference site
- Secured proposal for fall training management institute - to be held in conjunction with board meeting
- Secured and finalized location for Fall in person board meeting – Tennessee
- Coordinated all the activities necessary for hosting the October meetings and training events at Chattanooga Marriot Downtown
- Coordinated all activities required to facilitate the annual conference as the primary contact for the site
- Conducted site visit to Knoxville for 2023 Conference (along with conference chair)
- Solicit proposals for 2023 conference - Chattanooga convention center and Chattanooga Downtown Marriot was selected.
- 2022 transition meeting proposal received from Embassy Suites Orlando

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

- To accept the proposal for transition meeting to be held at Embassy Suites – Orlando
  - Dates 6/16/23 -6/19/23
  - Room rate \$159
  - Parking \$12.00
  - Wi-Fi included in meeting room
  - F&B minimum \$1,900
  - Complimentary meeting room with F&B minimum
  - 1:40 comp
  - 80% attrition
  - Group rate available 2 days pre/post
  - 50% discount on projector package & complimentary drop-down screen
  - Waived daily resort fee
  - Complimentary breakfast and evening reception

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

**Activity Summary:**

- Finalized negotiation with Marriot, Levy food Services and Chattanooga convention center for 2023 conference. Contracts have been executed.
- Negotiated and Secured Chattanooga Marriot contract for the fall training, board meeting and conference committee meeting. Contract has been executed.
  - Group rate honored three (3) days before and three (3) days after your event, subject to availability
  - Complimentary access to the fitness center and pool deck with room key
  - Complimentary basic Wi-Fi in guest rooms & meeting space for attendees
  - Valet parking for \$18.00/night and Self-Parking for \$15.00/night
  - 1/40 complimentary room nights
  - One upgrade to an Executive King at the group rate
  - \$169.00 room rate includes a \$10.00 rebate to be applied to the Master Account
  - 80% guarantee utilization (125 room nights in our block)
  - \$3000 F&B Minimum
  - Free meeting space
  - Free wi-fi
- Transition 2023 dates have been determined based on other scheduled events during June. The dates are: June 17 & 18 (travel days 6/16 & 6/19)
- Transition location will be Orlando – contact has been made with the hotel.
- Started working with the president elect to solicit proposals for 2024 conference.





**Southern Association of Student Financial Aid Administrators**

**Jacquelyn LeSueur/ Equity, Inclusion, & Global Issues Chair**

**Executive Board Report / October 2022**

**Committee Members**

Rhonda Bryant- University of Kentucky

Nancy Ferguson- University of Georgia

Karissa Lawson- University of Central Florida (**Former 21-22 SASFAA DLP participant**)

Kala Hudson- Converse University (**Former 21-22 SASFAA DLP participant**)

Zelotes Smith- University of Georgia

Lisa Davall- Georgia Military College

John Michael Scott- James Madison University

Stacy Baker- Georgia Northwestern Technical College

**Committee Goals for 2022-2023**

- Host a webinar as it relates to Diversity, Equity, & Inclusion.
- Provide session topics for the SASFAA Conference, workshops, or trainings.
- Ensure that training opportunities provided are inclusive to all who we serve in SASFAA.
- To provide SASFAA communication outlets with articles or relevant information as it pertains to diversity, inclusion, and equity.
- To have a successful second year of the SASFAA Diversity Leadership Program.
- Ensure a clear collaboration between the SASFAA Diversity, Equity, & Global Issues Committee and each State's Diversity/Inclusion Committee.
- Bring new opportunities as it relates to DEI to SASFAA.

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

N/A

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

N/A

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

N/A

**Activity Summary:**

**Equity, Inclusion & Global Issues Committee:**

- September: Information sent out to the SASFAA Community in celebration of Hispanic Heritage Month (September 15<sup>th</sup>- October 15<sup>th</sup>).
- Held a meeting on October 4<sup>th</sup> to discuss upcoming year.
  - Resources/Training material for smaller colleges as it relates to DEI
  - Hosting a webinar
  - Book Club (DEI topics)
  - Highlighting Organizations/Schools in SASFAA (Monthly)
  - 'I Belong Here Series'

**SASFAA Diversity Leadership Program:**

Brenda Ilojiolo- Valencia College (Florida)

Nicci Ratcliff- Virginia Tech (Virginia)

Esther Banks- Shaw University (North Carolina)

- Will be spotlighting and introducing the 22-23 SASFAA DLP participants to the SASFAA Community over the next couple of weeks.
- Meeting with the DLP participants next week. Had to reschedule due to the Hurricane that affected one of the participants.
- Still looking to secure mentors for the participants.
- Involvement with SASFAA Conference Sessions.



**Southern Association of Student Financial Aid Administrators**

**Angela Smith / Alabama President**

**Executive Board Report/October 2022**

**Executive Board**

**Goals for 2022-2023:**

Business as usual

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

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

**Activity Summary:**

Held our AASFAA Transition Meeting in person on June 23, 2022

Board meeting being planned for late October, 2022

Annual Conference held at Auburn Marriott Opelika Resort & Spa at Grand National on September 19-22, 2022

One- or two-day training in the Spring 2023



**Southern Association of Student Financial Aid Administrators**

**Nadine Bailey/Florida President**

**Executive Board Report/October 2022**

**Executive Board**

**Goals for 2022-2023:**

- Expand FASFAA's outreach through social media outlets such as LinkedIn and Instagram
- Offer the Clock Hour workshop in person and open to other states to attend
- Find training alternatives to FSA training for workshops and conferences

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

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

**Activity Summary:**

- Created FASFAA LinkedIn page.
- More social media activity on IG, LinkedIn and Facebook – used to share FASFAA events and all things financial aid.
- In-person clock hour workshop scheduled for Nov. 7-9, 2022 – listed on NASFAA & SASFAA. This training is open to all states.



**Southern Association of Student Financial Aid Administrators**

**David R. McMillion / Georgia President**

**Executive Board Report/October 2022**

**Executive Board**

GASFAA 2022-2023 Executive Board

- Elected Positions
  - President: David McMillion (GSFC)
  - Past-President: Angela Tate (TCSG)
  - President Elect: Kristie Teasley (Kennesaw State Univ)
  - Treasurer: Emmilee Mitchell (Mercer University)
  - Secretary: Wanda Pickens (University of Georgia)
  - VP Professional Development: Shannon Simmons (GA College and St.)
  - Treasurer-Elect: Audra Jimenez (North Georgia Technical College)
- Appointed positions
  - Partner Member: Cathy Nix (Piedmont University)
  - Diversity, Equity and Inclusion Chair: Christina Campbell (Kennesaw State. Univ.)
  - Program Chair: Jessica Alston (Columbus Technical College)
  - Legislative Affairs Chair: Joe Bucholz (Campus Logic)
  - Membership/Newsletter Chair: Karli Greenfield (Truitt University)
  - Technology Chair: Melodie Pirone (Southern Crescent Technical College)
  - Budget and Finance Chair: Pennie Strong (GSFC)
  - Leadership Development Chair: Sarah Baumhoff (Kennesaw State Univ.)
  - Strategic Plan: Maria Hammett (Mercer University)

**Goals for 2022-2023:**

- To continue to build on the successful return of in person conferences and workshops
- To maintain GASFAA strong fiscal footing
- To provide value feedback and advice to the SASFAA Executive board.
- To support SASFAA initiatives on the state level

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

- None at this time

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

- None at this time

**Activity Summary:**

- GASFAA has sent reminder emails to its members about renewing Institutional and Partner Membership before the grace period end October 31 2022
- GASFAA will have its fall workshop on the Mercer Macon, GA. campus October 20-21 2022
  - Shannon Simmons is the VP of Professional Development had developed an agenda, secured space and is ready to start off our 2022-2023 training season

GASFAA Spring Conference will take place at Lake Lanier Islands May 31- June 2 2023



**Southern Association of Student Financial Aid Administrators**

**Mark Messingschlager / Kentucky President**

**Executive Board Report / October 2022**

**Executive Board**

**Activity Summary:**

Since the July meeting of the SASFAA board, President Messingschlager and KASFAA have been focused on several events, including the upcoming fall training conference in Louisville, KY October 12-14. Headlining the conference will be the immediate past NASFAA chair and SASFAA's own, Brent Tener from Vanderbilt University and detectives from the Office of Inspector General. KASFAA will also be piloting a federal update panel discussion where the most recent federal update will be broken down by a panel of top financial aid administrators who will then welcome discussion from the attendees.

On September 21, KASFAA hosted a high school guidance counselors' workshop for approximately 45 attendees across the commonwealth. The following week, KASFAA, in coordination with Kentucky Educational Television which is an affiliate of PBS, filmed an episode of the "Education Matters" series on Financial Aid and the importance of filing FAFSA. The episode will air on Monday, October 10 to views statewide.

In recognition of the 2023-24 FAFSA opening on October 1, the KASFAA President joined the Kentucky Higher Education Assistance Authority's (KHEAA) event where October was proclaimed "Financial Aid Awareness Month" in the state of Kentucky by the Governor.

Work continues on the new KASFAA website. Current projections are to have the new website unveiled at the spring KASFAA conference in April.

President Messingschlager has also been working with NCASFAA to improve investment opportunities.



**Southern Association of Student Financial Aid Administrators**

**Terry Bland / Mississippi President**

**Executive Board Report/October 2022**

**Executive Board**

**Goals for 2022-2023:**

Business as usual

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

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

**Activity Summary:**

Held our MASFAA Transition Meeting via Zoom on August 2, 2022.

In-Person Board Meeting scheduled for October 4-5, 2022.

Fall Training scheduled for November 3, 2022.

Annual Conference scheduled for April 26-28, 2023.





**Southern Association of Student Financial Aid Administrators**

**Michelle Hemmer /North Carolina President**

**Executive Board Report/October 2022**

**Executive Board**

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 regions.

**Goals for 2022-2023:**

We updated our strategic plan to 5-year plan vs 3 years. My hope is that it will guide us to accomplish as much as we can in a year.

- Increase membership at the 4-year institution level and increase membership engagement by being more active with membership and promoting various trainings being offered throughout the year.
- Offer in person and virtual professional development trainings to membership.
- Increase public awareness to who NCASFSA is and what NCASFSA does.
- Financial Stability for NCASFSA by increasing investment options vs CD's.

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

N/A

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

**Activity Summary:**

Held our 2<sup>nd</sup> meeting September 16<sup>th</sup> virtually.

- We had Mark from KY join our September Board Meeting to provide us information on their investments and how they have been able to increase their funds.
- Working on a new investment policy established by a subcommittee.
- We discussed our Fall conference that is being held October 24<sup>th</sup>-26<sup>th</sup> at the Embassy Suites, Concord, NC.
- Budget has been finalized.
- We are working on cleaning out our membership database.
- Created a subcommittee to recommend information on institutional membership vs individual memberships.



**Southern Association of Student Financial Aid Administrators**

**Missy Perry / South Carolina President**

**Executive Board Report/October 2022**

**Executive Board**

**Goals for 2022-2023:**

- Gain an understanding of my role and the SASFAA association and operations.
- Contribute in any capacity to the President’s visions & goals.
- Ensure that SCASFAA is appropriately represented in all SASFAA matters to include increasing our membership in the association.
- To observe and learn functions of other state associations to better equip SCASFAA in its mission.

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

N/A

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

N/A

**Activity Summary:**

- Plans are underway for our annual conference in Myrtle Beach, SC from October 16-19. Our conference theme is “Welcome to Fabulous SCASFAA” (Las Vegas). Our Charity is in Bow and Arrow Center of Hope for Suicide Awareness/Prevention. We will have a general session on Diversity, Equity, and Inclusion offered by our new DEI committee (previously Global Issues). We have a preconference session on Leadership and a NASFAA U credential session on Direct Loans.
- Our VP, Adam Ghiloni has set up all dates for training for the year, including a webinar every month. We will continue with our Book Club.

Respectfully Submitted,

Missy Perry, SCASFAA President



**Southern Association of Student Financial Aid Administrators**

**Charles Harper/ Tennessee President**

**Executive Board Report / October 2022**

**Executive Board**

**2022-2023 TASFAA Executive Board**

President	Charles Harper	Belmont University
President-Elect	Jennifer Byrd	Nashville State CC
Past President	Jeff Norrod	Tennessee Tech
Secretary	Chanell Thomas	Vanderbilt University
Treasurer	Ashley Edens	College Raptor
4 yr. Public Rep.	Bill McCord	Middle Tennessee State University
4 yr. Private Rep.	Erin Johnson	Maryville College
2 yr. CC Rep.	Jamie Hamby	Cleveland State CC
TCAT Rep.	Mark Voeltzke	Tennessee College of Applied Technology Nashville
Proprietary Rep.	Randy Cotterell	Mind & Body Institute
Member at Large	Isaac Jones	Middle Tennessee State University

**2022-2023 Committee Chairs**

Awards	Lacey Weese	Tennessee Wesleyan
Association Governance	Jeff Gerkin	University of Tennessee
Budget/Finance	Melissa Smith	Vanderbilt University
Conference	April Woolford	University of Tennessee
Diversity	Eric Farmer	THEC/TSAC
Electronic Services	Ken Scanapiego	UT Chattanooga
Governmental Relations	Ron Gambill	ELFI
Historical	April Cross	Lee University
Long Range Planning	Marian Dill	Lee University
Membership	Samantha Sullivan	Vanderbilt University
Public Relations/Blog	Tori Watson	EdAmercica
Site Selection	Leah Louallen	THEC/TSAC
Sponsorship	Jonathan Looney	Sallie Mae
State Programs	Leah Louallen	THEC/TSAC
Training	Jo Wallace	THEC/TSAC

**Goals for 2022-2023:**

Goals for Tennessee Association of Student Aid Administrators

- 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
- Offer Fall training across the state to continue Professional Development for TASFAA members

- Review and update Policy and Procedures to align with current processes and LRP
- Work with TASFAA Long Range Planning Chair on new 5 yr. LRP for TASFAA
- Continue to strengthen relationship with THEC/TSAC

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

N/A

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

N/A

**Activity & Events Summary:**

President Harper represented TASFAA at the TSAC/THEC Board of Directors Meeting on September 26<sup>th</sup> in Nashville, TN.

TASFAA Conference Committee and Board Meeting was held October 6-7 in Cookeville, TN. The conference committee met on October 6<sup>th</sup> as we began preparing for the 55th annual TASFAA Conference. The Board had a productive meeting on October 7th with discussions supporting our goals as outlined in the July SASFAA report.

**Upcoming Events**

TSAC/THEC New Aid Officers Workshop and the TASFAA Regional Fall Training will be held across the three regions of the state. The training will consist of 2 days with day one being the TSAC New Aid Officers Workshop and day two being the TASFAA fall training workshop. The dates and locations are as follows:

**East TN Region: October 19-20, Pellissippi State CC**

**Middle TN Region: October 31 and November 1, Nashville State CC**

**West TN Region: November 2-3, TCAT Memphis-Bartlett**

- **Day 1-** THEC/TSAC will hold a New Aid Officer Workshop (NAOW) for all state programs. TASFAA membership NOT required.
- **Day 2-** TASFAA will hold their first Fall Training in three years! Our TSAC friends will help us dig a little deeper into the TN State Grant Programs along with a NASFAA representative and TN Achieves presentation on The Complete Grant.

TASFAA Conference Committee and TASFAA Board Meeting: January, Dates TBD

TASFAA Conference: April 16-19, 2023 in Franklin, TN



**Southern Association of Student Financial Aid Administrators**

**Joe Dobrota / Virginia State President**

**Executive Board Report/October 2022**

**Executive Board**

<b><u>Board Members</u></b>	<b><u>Name</u></b>	<b><u>School</u></b>	<b><u>E-mail</u></b>
<b>President</b>	Joe Dobrota	William & Mary	<a href="mailto:jdobrota@wm.edu">jdobrota@wm.edu</a>
<b>President-Elect</b>	Ryan McNamara	Central VA Community	<a href="mailto:mcnamarar@centralvirginia.edu">mcnamarar@centralvirginia.edu</a>
<b>Past President</b>	Beth Armstrong	Virginia Tech	<a href="mailto:beth1@vt.edu">beth1@vt.edu</a>
<b>Secretary</b>	Dominique Maddux-Jackson	J. Sargeant Reynolds Community College	<a href="mailto:dmaddux-jackson@reynolds.edu">dmaddux-jackson@reynolds.edu</a>
<b>Treasurer</b>	Kelley Florian	Bon Secours Memorial College of Nursing	<a href="mailto:kelley_florian@bshsi.org">kelley_florian@bshsi.org</a>
<b>Treasurer-Elect</b>	Taniya LeGrand	Tidewater Community	<a href="mailto:tlegrand@tcc.edu">tlegrand@tcc.edu</a>
<b>Representative-at-Large</b>	Andrew Quinn (2 of 2 yr)	Brightpoint Comm College	<a href="mailto:iquinn@brightpoint.edu">iquinn@brightpoint.edu</a>
<b>Representative-at-Large</b>	Rosa Thomas (1yr appoint)	Hampden-Sydney College	<a href="mailto:rthomas@hsc.edu">rthomas@hsc.edu</a>
<b>Representative-at-Large</b>	Melissa Franks (1 of 2 yr)	William & Mary	<a href="mailto:mjfranks@wm.edu">mjfranks@wm.edu</a>
<b>Representative-at-Large</b>	Debra Johnson (1 of 2 yr)	Radford University	<a href="mailto:djohnson@radford.edu">djohnson@radford.edu</a>
<b>Special Appointee (P&amp;P Review)</b>	Elizabeth Daniel	ELM Resources	<a href="mailto:edaniel@elmresources.com">edaniel@elmresources.com</a>

**Goals for 2022-2023:**

- Provide a voice for Commonwealth of Virginia aid administrators on the SASFAA Board.
- In-Depth review of VASFAA’s P&P; with particular emphasis placed on ensuring correct integration of VASFAA’s interactions with SASFAA.

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

None

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

None

**Activity Summary:**

Virtual Zoom Board meeting was held on August 9<sup>th</sup>. Key actions at this meeting included approving a proposal for the Sue D Ross Fund/Buddy Award and Approval of 2022-23 Development Partner pricing structure.

Planning is underway for fall non-conference training event at Virginia State University (Petersburg) for October 28<sup>th</sup>.

Planning and registration is underway for VASFAA Directors Summit at University of Richmond on October 18<sup>th</sup>.

Contract for January 2023 in-person Board meeting at conference hotel (Portsmouth, VA) was received and awaits approval.

Initial contacts with conference charity have been made.

Scheduled September 13<sup>th</sup> Virtual Zoom Board meeting was postponed due to an unexpected fire alarm in the host's building.

Planning meetings were held for the proposed Pod/Small Group professional development networking groups.



**Southern Association of Student Financial Aid Administrators**

**Sandy Neel/ Association Governance**

**Executive Board Report / October 2022**

**Committee Members**

Sandy Neel- Chair- Spalding University

Runan Pendergrast- Bluegrass Community and Technical College

Brenda McCafferty- ECMC

David Alexander – ECPI University

Stephanie Miller- Central Alabama Community College

Cindy May- University of Mississippi

Daniel Barkowitz- University of Miami Observer

Michael Morgan- SASFAA President Ex-Officio

**Committee Goals for 2022-2023:**

1. Examine the Long-Range Plan Goals and informing the Board of the progress toward meeting the goals. This includes updating the Board throughout the year on successes and opportunities. P&P
2. Evaluate the Board's goals to ensure they are in line with (or in support of) the Long-Range Plan, the P&P, and the By-Laws of the Association. P&P
3. Hold an in-person meeting to evaluate the Board's progress toward meeting goals and write the GAP report. P&P
4. Review the previous year's GAP report before the first Board meeting of the year for recommendations and met goals. P&P
5. Review the LRP and make revisions a deemed necessary/ P&P
6. Review P&P and By-Laws and making recommendations for changes that meet current best practices, the mission and the vision of the Association. P&P
7. Ensure the Board is following the P&P and By-Laws. P&P
8. Assess the efforts being made to encourage Diversity (Race, gender, sector, etc.) involvement at all levels and making recommendations to assist in fulfilling the efforts. P&P
9. Review annually the financial stability of the association. P&P
10. Assess and recommend training opportunities. P&P
11. Establish a committee list serve, if necessary, and provide updates and evaluations of the long-range plan in the SASFAA Nine News and on the website; and make recommendations to the president and Board of Directors. P&P

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

The Chair started a discussion with the Committee regarding our Long-Range Plan and the evaluation process. The Chair had one response from a committee member. A new form was developed to record the Board and Committee Chairs goals for the year. This will be completed and used for the GAP evaluation process if the Board likes this way of reporting. See Attached (Appendix A)

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

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

Where are we on last year's P&P Changes that Sara was going to get completed?

**Activity Summary:**





**Southern Association of Student Financial Aid Administrators**

**Brenda Brown/ Partner Advisory Board, Special Projects**

**Executive Board Report / October 2022**

**Committee Members**

***Business Partner Advisory Group Committee***

<b>Committee Role</b>	<b>Name</b>	<b>Company</b>
Chair	Brenda M. Brown	College Aid Services
Member	Irma Molinares	ECMC
Member	Tori Watson	Edamerica
Member	William Shaffner	MOHELA
Member	Scott Orris	ELM Resources
Member	Janee Knippenberg	PNC
Member	Becky Davis	Ascendium Education Solutions
Member	Tim Young	Earnest
Ex-Officio (Sponsorship Chair)	Geoffrey Stam	Keiser University

**Committee Goals for 2022-2023**

- Increase attendance at the annual conference
  - Support the Conference Committee with the 60<sup>th</sup> Anniversary celebration.
  - Cultivate business partners to contribute to the annual conference's success.
- Increase Membership and Volunteerism
  - Provide Value of Membership – Growing the “WE” culture! Business Partner members are valued as members and can volunteer and contribute in the same manner as institutions.
  - Collaborating with the other SASFAA Committees to cultivate connections to SASFAA Legacy – former leaders and members that have retired or are not as active in the association.
  - Creation of Business Partner presence on the SASFAA website
- Increase Sponsorship
  - Develop partnerships for repeat and new sponsorships to support SASFAA professional development opportunities and events
  - Redesign of the Business Partner Services Directory
- Increase collaboration opportunities between state and region
  - Utilize state sponsorship or business partner liaisons in committee

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

*GOAL 4: Board of Directors* – As an appointed member of the Board of Directors, as the Special Projects, Business Partner Liaison will incorporate the President and SASFAA’s vision in developing the committee's goals and objectives for the year and recommendations for subsequent years. < *Completed - Shared with the Business Partner Advisory Group Committee (BPAGC)* >

*GOAL 5: Committees*– As the Special Projects, Business Partner Liaison will:

- provide the composition of the committee members for Board approval and to be included in the President's annual report. < *Completed – provided to President Morgan on 08/16/2022 and included on this report.* >

*GOAL 7 & 8: Membership* – As the Special Projects, Business Partner Liaison will support the goals of increasing membership and expanding the benefits, services, and resources to all members. We will emphasize growing a “WE” culture so that business partners are seen as valued members. < *In Progress – BPAGC is developing a survey for members to collaborate with the Membership Committee.* >

### ***SLP II: Communication/Collaboration***

*GOAL 9: Communication* – As the Special Projects, Business Partner Liaison, in collaboration with the Sponsorship Chair will establish communication with Business Partners/Sponsors to disseminate:

- our goal and objectives for the year
- “Value” of business partners – value as SASFAA members (volunteer, trainer, advocacy, etc.), and the value of products and services to our institutional members.
- Share Sponsorship Opportunities
- Share SASFAA Events Calendar
- Share SASFAA 60<sup>th</sup> Anniversary Celebrations (i.e. conference, etc.)
- Share Committee Members with Business Partners/Sponsors
- Share special projects and how they can contribute

< *In Progress – Have communicated to the BPAGC and the SASFAA Business Partners via email to share goals and objectives, upcoming events, BPADGC members, and the concept of BP Open Forum Meetings* >

### ***SLP III: Professional Development***

Collaborate with SASFAA Committees (i.e. Professional Development, Conference, etc.) to utilize Business Partners/Sponsors and resources to support professional and leadership development. Consider incorporating a special project to complement SASFAA training events. It is imperative to bring more business partners into the fold and allow them to share their talents, expertise, resources, and volunteerism with SASFAA. < *In Progress – Communicated to the VP of Training, Management Institute Chair, and Conference Committee Chair that we are available to facilitate BP volunteer involvement Also serving as a member of the Conference Committee.* >

*GOAL 10: Professional Development* – Support both SASFAA and collaborative training opportunities amongst member states, sister regional organizations, and NASFAA. This may include and is not limited to business partner sponsorship, volunteers, presenters, moderators, and instructors, to support SASFAA training events.

*GOAL 11: Leadership Development* – Support leadership development opportunities. This may include and is not limited to business partner sponsorship, volunteers, presenters, moderators, instructors, etc. to support SASFAA leadership events.

### ***SLP V: Policy Advocacy***

< *In Progress* – BPAGC agrees that we can support advocacy training and efforts. The next steps will be for us to connect with Legislative Committee Chair.>

GOAL 17: Educate membership on legislative advocacy.

GOAL 18: Provide opportunities for legislative advocacy.

GOAL 20: Provide for congressional visits when needed and included in the budget.

Collaborate with Business Partners to volunteer to serve on committees or support (i.e. production of annual legislative guide, communications, training, resources, congressional visits, etc.) SASFAA advocacy efforts.

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

N/A

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

None at this time

**Activity Summary:**

Collaborated with the Sponsorship Chair in the creation of the 2022-23 Sponsorship Opportunities Menu to be submitted to the Board for approval.

Completed creation of the Business Partner Advisory Group Committee (BPAGC) and called the first meeting for August 29, 2022.

**Communications**

Sent the SASFAA Business Partners an email communication introducing myself as the Special Projects Chair/BP Liaison and BPAGC Chair. Communication disclosed to the BPAGC members, outlined this year's goals and objectives, and advise them of BP Open Forums to be held throughout the year.

**1<sup>st</sup> BPAGC Meeting**

On August 29, 2022, the 2022-23 Business Partner Advisory Group Committee (BPAGC) met for the first time. President Michael Morgan and Brenda addressed the BPAGC to outline goals and objectives for 2022-23. Items discussed included:

- Creating the “WE” culture in SASFAA. SASFAA has an individual membership therefore, membership value and benefits are mostly alike regardless of their affiliation to an institution or organization. All members bring value, and we need to “tap” into that.
- Other primary goals are for Business Partners (BP's) to:
  - support increasing SASFAA's membership
  - support SASFAA's mission (i.e., training and advocacy)
  - increase BP engagement in SASFAA
  - build a BP presence on the SASFAA website
  - reimagine the SASFAA BP Service Directory

We will collaborate to bring President Morgan's Special Project to light which includes videos with topics in wellness, leadership, and financial aid. We will also be exploring a special video presentation for the 60<sup>th</sup> SASFAA Anniversary celebration at the SASFAA Annual Conference, February 2023 in Chattanooga, TN.

In addition, we ask the BPAGC to think outside the box and we are exploring collaborating with the Membership Committee to survey membership on a few items such as:

- Who does not go to the conference? If so, why?
- Who is not a member? If so, why?
- Who visits or networks with BP? If not, why?

Committee Assignments:

- Tim Young will be working on the BP website presence and collaborating with the FASFAA Electronic Services Chair to implement it on the FASFAA website.
- Irma Molinares will be leading the “reimaging” of the BP Service Directory and collaborating with Tim Young on how to add to the SASFAA website.
- Tim also volunteered to create a member survey mentioned above.

The BPAGC agreed to meet monthly. However, due to Hurricane Ian, the September member did not occur and Brenda will reschedule as soon as possible.

Future Plans

Continue to collaborate with the Sponsorship Chair to meet SASFAA goals and objectives.

Continue to serve as a Conference Committee member to support conference planning.

Schedule future BPAGC meetings

Schedule BP Open Forum meetings

Complete Contract negotiations for the Special Project Videos

Begin the Special Project – select the committee and begin projects

Begin review of SASFAA Bylaws, P & P, and other SASFAA publications for possible updates or revisions.

Appendix A

**SASFAA 2022-23 Year End Committee or  
Officer Report for Evaluation Process:** \_\_\_\_\_

(Your name and Board position/Committee name)

**SUMMARY**

The purpose of this report is to gain an understanding of the successes and opportunities for SASFAA Committees and Officers on the Executive Board for the year. This information is used to measure the successes of SASFAA in meeting the goals set through the Long-Range Plan, the P&P, and the President. We do this evaluation to ensure SASFAA continues to serve its members effectively and efficiently.

COMMITTEE MEMBERS

*Example: Sandy Neel, Caucasian, Female, Chair Long Range Planning Committee, Spalding University*

GOALS FOR THE YEAR (List the goals you worked on from P&P, LRP, and the President this year)

1. Update/rewrite the Long-Range Plan for the next 5 years. **P&P 6.13**

GOALS COMPLETED (list the goals you completed and activities that you did to meet the goal)

1. Update/rewrite the Long-Range Plan for the next 5 years.
  - a. **The Committee is presenting the new Long Range Plan to the Board at the Transition meeting in June**

GENERAL REFLECTION OF THE YEAR (your feeling about the year, things you liked, things you would change etc.)

OTHER (Please list anything else you would like us to know)

Thank you for providing this information!

Association  
Governance and  
Planning Committee  
2022-2023