

Southern Association
of Student Financial
Aid Administrators
July 2022



Agenda and
Board Reports

Prepared by Secretary Nicole Patrick

Table of Contents:

Agenda:2
President Board Report:3
President Elect Board Report:4
Past President Board Report:6
Vice President Board Report:7
Secretary Board Report:8
Treasurer Board Report:9
Budget & Finance Chair Board Report:14
Conference Committee Chair Board Report:17
Sponsorship Chair Board Report:19
Communications and Outreach Chair Board Report:22
Electronic Services Chair Board Report:23
Legislative Relations Committee Chair Board Report:24
Membership Chair Board Report:26
Site Selection Chair Board Report:27
Equity Inclusion & Global Issues Chair Board Report:29
Alabama State Report:30
Florida State Report:31
Georgia State Report:32
Kentucky State Report:34
Mississippi State Report:35
North Carolina State Report:36
South Carolina State Report:37
Tennessee State Report:38
Virginia State Report:40
Association Governance Board Report:.....42
Special Projects Board Report:..44

AGENDA
SASFAA Board Meeting
July 27 and 28
Virtual

Wednesday, July 27, 2022

2:00 PM

Board Meeting

Virtual

Call to Order

Michael Morgan

Roll Call / Establish a Quorum

Nicole Patrick

Action Item: Management Institute Registration Fee Sandy Neel for Leigh Ann Hussey

Action Item: 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? Jenelle Handcox

Action Item: 2022-2023 Operating Budget presentation Jenelle Handcox

Action Item: Mileage reimbursement Jenelle Handcox

Action Item: Establish Executive Board emergency travel line item and Review Committee Jenelle Handcox

Action Item: Executive Board vote to approve committee Members Stephanie Miller

Action Items: To hold Fall training event, Conference committee meeting and board meeting at 2023 conference location at Chattanooga Marriot – Wednesday October 5- Sunday October 9 Joan Bailey

Round of Successes (2-3 minutes each) All

New Business Michael Morgan

Old Business Michael Morgan

Adjournment Michael Morgan



Southern Association of Student Financial Aid Administrators

Michael D. Morgan / SASFAA President

Executive Board Report/July 202

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

Conduct monthly check in meetings

Motion/ Action Item(s):

None at this time

Policy & Procedure: Changes/ Recommendations:

None at this time

Activity Summary:

Led a lively discussion during transition meeting to help set the goals for this upcoming year. (Please reflect on the SASFAA Transition Discussion) The 2223 executive board came up with incredible ideas on how to best market SASFAA, increase membership, increase volunteerism and provide value to our membership through a joint effort.

Attended NASFAA Online Transition Meetings chaired by Brad Barnett 2223 NASFAA Chair

Missed NASFAA Board as an observer due to travel complications

Met Online with Budget and Finance Committee to finalize budget proposal

Met with multiple committee chairs to discuss plans for 2223



Southern Association of Student Financial Aid Administrators

Daniel T. Barkowitz, President-Elect

Executive Board Report/July 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 (and see below):

State Association	Dates	Location	Hotel	Visiting President
<i>AASFAA - Alabama</i>	September 19 - 22, 2022	Opelika, AL	Auburn Marriott Opelika	Ryan - VASFAA
<i>FASFAA - Florida</i>	May 23-26, 2023	Ft. Myes, FL	Luminary Hotel	Heather - MASFAA
<i>GASFAA - Georgia</i>	May 31 - June 2, 2023	Lake Lanier, GA		Jennifer - TASFAA
<i>KASFAA – Kentucky (Fall)</i>	October 12 - 14, 2022	Louisville, KY	Holiday Inn Louisville East	xxxxxxxxx
<i>KASFAA – Kentucky (Spring)</i>	April 19-21, 2023	Lexington, KY		Zachary - SCASFAA
<i>MASFAA - Mississippi</i>	June 5-9, 2023	Biloxi, MS		Cierra - AASFAA
<i>NCASFAA - North Carolina</i>	October 22-26, 2022	Concord, NC	Hilton Charlotte / Concord Golf	Kris - FASFAA
<i>SCAFSAA - South Carolina</i>	October 16 - 19, 2022	Myrtle Beach, SC	Marina Inn at Grande Dunes	Ann - NCASFAA
<i>TASFAA - Tennessee</i>	April 16-19, 2023	Franklin, TN	Cool Springs Marriott	Kristie - GASFAA
<i>VASFAA - Virginia</i>	May 7 - 10, 2023	Portsmouth, VA	Renaissance Portsmouth-Norfolk Hotel	Michelle - KASFAA

- Will be attending CNAR (College Needs Analysis Roundtable) in October, and serving on College Board’s Higher Ed Colloquium Planning Committee from 2022-25.

Submitted with gratitude,

DANIEL T. BARKOWITZ



Southern Association of Student Financial Aid Administrators

Celena Tulloss / Past President

Executive Board Report/July 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

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



Southern Association of Student Financial Aid Administrators

Leigh Ann Hussey / Vice President

Executive Board Report/July 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):

Management Institute Registration Fee

Policy & Procedure: Changes/ Recommendations:

None at this time

Activity Summary:

Discussions have already begun for NAOW 2023. The dates will be June 4 – 9.

The Management Institute Committee has met and decided on a topic/theme. The website will open up and be publicized once the registration fee is approved.



Southern Association of Student Financial Aid Administrators

Nicole Patrick / Secretary

Executive Board Report/July 2022

Committee Members

TBD

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

LRP and GAP Goal Activity to date:

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:



Southern Association of Student Financial Aid Administrators

Sarah Baumhoff / Treasurer

Executive Board Report / July 2022

	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
Income				
01 Membership Dues		37,625.00	-37,625.00	
01-1 CY Membership - General	28,245.00		28,245.00	
Total 01 Membership Dues	28,245.00	37,625.00	-9,380.00	75.07 %
02 Professional Development Income		50,625.00	-50,625.00	
02-1 CY Summer Workshop	73,280.00		73,280.00	
02-10 Pre-Conference Training	3,000.00		3,000.00	
02-2 PY Summer Workshop		800.00	800.00	
02-6 Management Institute		80.00	80.00	
02-9 NASFAAU at Annual Meeting	1,500.00		1,500.00	
Total 02 Professional Development Income	78,660.00	50,625.00	28,035.00	155.38 %
03 Annual Meeting		82,500.00	-82,500.00	
03-1 CY Annual Meeting	77,120.00		77,120.00	
03-3 PY Annual Meeting		400.00	400.00	
Total 03 Annual Meeting	77,520.00	82,500.00	-4,980.00	93.96 %
04 Sponsorship		50,000.00	-50,000.00	
04-1 Conference Sponsorships	64,100.00		64,100.00	
Total 04 Sponsorship	64,100.00	50,000.00	14,100.00	128.20 %
07 Interest Earned		4.80	4.80	
07-1 Bank Accounts				
07-5 NASFAA (Charles Schwab)		3.00	3.00	
Total 07 Interest Earned		7.80	7.80	
08 Miscellaneous Income		139.46	139.46	
09 Transfer from Assets		90,125.00	-90,125.00	
11 Dividends Earned		20,000.00	-20,000.00	
11-1 NASFAA (Charles Schwab)	12,219.69		12,219.69	
11-2 Edward Jones Money Market		0.57	0.57	
11-6 Advisory Solutions 20/80 @ Edward Jones	11,384.18		11,384.18	
Total 11 Dividends Earned	23,604.44	20,000.00	3,604.44	118.02 %
12 Capital Gains/Losses				
12-1 NASFAA (Charles Schwab)	10,557.28		10,557.28	
12-5 Advisory Solutions 20/80 @ Edward Jones	9,390.97		9,390.97	
Total 12 Capital Gains/Losses	19,948.25		19,948.25	

13 Charity Income for Named Charity	3,874.00		3,874.00	
Total Income	\$296,098.95	\$330,875.00	\$ -34,776.05	89.49 %
GROSS PROFIT	\$296,098.95	\$330,875.00	\$ -34,776.05	89.49 %
Expenses		9,000.00	-9,000.00	
101 President				
101A President Travel	3,449.25		3,449.25	
101A-1 State Conference Travel	1,888.53	4,500.00	-2,611.47	41.97 %
Total 101 President	5,337.78	13,500.00	-8,162.22	39.54 %
TOTAL				
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
102 President-Elect		7,850.00	-7,850.00	
102A President-Elect - Travel -Other	1,340.81		1,340.81	
102B Travel	3,749.43		3,749.43	
Total 102 President-Elect	5,090.24	7,850.00	-2,759.76	64.84 %
103 Vice President		3,000.00	-3,000.00	
103A Vice President- Travel	1,818.81		1,818.81	
103D Vice President - Postage (deleted)		7.95		7.95
Total 103 Vice President	1,826.76	3,000.00	-1,173.24	60.89 %
104 Secretary		3,100.00	-3,100.00	
104A Secretary - Travel	1,951.48		1,951.48	
Total 104 Secretary	1,951.48	3,100.00	-1,148.52	62.95 %
105 Treasurer		3,700.00	-3,700.00	
105A Treasurer - Travel	1,414.34		1,414.34	
105K Treasurer- Miscellaneous		824.55	824.55	
Total 105 Treasurer	2,238.89	3,700.00	-1,461.11	60.51 %
106 Past President		5,425.00	-5,425.00	
106A Past President - Travel	3,090.82		3,090.82	
106F Past President - Supplies		200.00	200.00	
Total 106 Past President	3,290.82	5,425.00	-2,134.18	60.66 %
201 Membership		1,900.00	-1,900.00	
201A Membership - Travel	1,921.70		1,921.70	
Total 201 Membership	1,921.70	1,900.00	21.70	101.14 %
202 Electronic Services		6,450.00	-6,450.00	
202A Electronic Services - Travel	1,072.53		1,072.53	
202K Electronic Services - Misc	8,795.08		8,795.08	
Total 202 Electronic Services	9,867.61	6,450.00	3,417.61	152.99 %
203 Professional Development Expense 203-1 CY Summer Workshop		65,000.00	-65,000.00	
203-1A CY Summer Workshop - Travel	2,790.03		2,790.03	
203-1F CY Summer Workshop - Supplies	5,595.12		5,595.12	
203-1G NAOW Honorarium	6,198.00		6,198.00	
203-1J CY Summer Workshop - Meetings	32,132.31		32,132.31	

203-1K CY Summer Workshop - Miscellaneous		98.33	98.33	
Total 203-1 CY Summer Workshop	46,813.79		46,813.79	
203-2 Professional Advancement CY Leadership Symposium	6,366.96		6,366.96	
203-4K Intermediate Workshop - Miscellaneous		34.12	34.12	
Total 203-4 Intermediate Workshop		34.12	34.12	
203-5 Management Institute		20.00	20.00	
203-5K Management Institute - Miscellaneous		20.00	20.00	
Total 203-5 Management Institute		20.00	20.00	
203-4 Intermediate Workshop				
TOTAL				
		ACTUAL	BUDGET	OVER BUDGET
				% OF BUDGET
Total 203 Professional Development Expense	53,234.87	65,000.00	-11,765.13	81.90 %
204 Communications & Outreach		2,600.00	-2,600.00	
204A Communications & Outreach Travel	991.72		991.72	
Total 204 Communications & Outreach	991.72	2,600.00	-1,608.28	38.14 %
205 Budget and Finance		4,500.00	-4,500.00	
205A Budget and Finance - Travel	1,314.03		1,314.03	
205J Budget and Finance - Meetings	501.92		501.92	
Total 205 Budget and Finance	1,815.95	4,500.00	-2,684.05	40.35 %
206 Annual Meeting Program		120,000.00	-120,000.00	
206A Annual Conference - Travel	1,624.58		1,624.58	
206F Annual Conference - Supplies	2,766.35		2,766.35	
206G Annual Conference Honorarium	3,830.00		3,830.00	
206J Annual Conference - Meeting	115,030.88		115,030.88	
206K Annual Conference - Miscellaneous	663.77		663.77	
Total 206 Annual Meeting Program	123,915.58	120,000.00	3,915.58	103.26 %
207 Site Selection		2,500.00	-2,500.00	
207A Site Selection - Travel	2,116.26		2,116.26	
Total 207 Site Selection	2,116.26	2,500.00	-383.74	84.65 %
210 Executive Board		35,500.00	-35,500.00	
210-2 Executive Board - Transition			2,954.06	
210-2A Executive Board - Transition - Travel	2,954.06			
210-2J Executive Board - Transition - Meeting	15,961.38		15,961.38	
Total 210-2 Executive Board - Transition	18,915.44		18,915.44	
210-3 Executive Board - State President Rooms	1,456.80		1,456.80	
210-3A Executive Board - State President Rooms - Travel				
Total 210-3 Executive Board - State President Rooms	1,456.80		1,456.80	
210-5 Executive Board - Meetings	568.40		568.40	
210-5A Executive Board - Meetings - Travel	275.08		275.08	
210-5J Executive Board - Meetings - Meeting	12,323.65		12,323.65	
Total 210-5 Executive Board - Meetings	13,167.13		13,167.13	

210-K Executive Board - Miscellaneous	520.85		520.85	
Total 210 Executive Board	34,060.22	35,500.00	-1,439.78	95.94 %
211 President's Contingency		2,000.00	-2,000.00	
211F President's Contingency - Supplies	381.64		381.64	
211K President's Contingency - Miscellaneous	152.65		152.65	
Total 211 President's Contingency	534.29	2,000.00	-1,465.71	26.71 %
213 Advanced Program Planning		500.00	-500.00	
214 Equity, Inclusion & Global Issues		2,500.00	-2,500.00	
214A Equity, Inclusion & Global Issues -Travel	149.17		149.17	
214K Equity, Inclusion & Global Issues - Miscellaneous	2,056.70		2,056.70	
Total 214 Equity, Inclusion & Global Issues	2,205.87	2,500.00	-294.13	88.23 %
TOTAL				
	ACTUAL	BUDGET	OVER BUDGET	% OF BUDGET
216 Legislative Relations		2,500.00	-2,500.00	
216A Legislative - Travel	172.10		172.10	
Total 216 Legislative Relations	172.10	2,500.00	-2,327.90	6.88 %
217 Association Governance (LRP & GAP) 217-1 Long Range Plan		4,100.00	-4,100.00	
217-1A Long Range Planning - Travel	567.86		567.86	
Total 217-1 Long Range Plan	567.86		567.86	
Total 217 Association Governance (LRP & GAP)	567.86	4,100.00	-3,532.14	13.85 %
218 Vendor/Sponsor		3,500.00	-3,500.00	
218A Vendor/Sponsor - Travel	960.05		960.05	
Total 218 Vendor/Sponsor	960.05	3,500.00	-2,539.95	27.43 %
220 Resource Partner Liaison		1,800.00	-1,800.00	
220A Resource Partner Liaison-Travel	1,123.53		1,123.53	
Total 220 Resource Partner Liaison	1,123.53	1,800.00	-676.47	62.42 %
224 Accounting & Legal Fees		18,250.00	-18,250.00	
224-1 Accounting Fees	10,639.75		10,639.75	
224-3 NASFAA Charles Schwab Account	2,122.00		2,122.00	
224-4 224-4 Edward Jones Advisory Solutions	7,044.64		7,044.64	
Total 224 Accounting & Legal Fees	19,806.39	18,250.00	1,556.39	108.53 %
225 Online Payment Processing Fees	5,708.44	4,500.00	1,208.44	126.85 %
228 Inter-State Travel		4,500.00	-4,500.00	
228A Inter-State Travel-Travel	1,658.10		1,658.10	
Total 228 Inter-State Travel	1,658.10	4,500.00	-2,841.90	36.85 %
229 Awards	510.01	3,000.00	-2,489.99	17.00 %
231 Insurance	6,254.00	2,700.00	3,554.00	231.63 %
232 Bookkeeper	6,000.00	6,000.00	0.00	100.00 %
233 Miscellaneous Expense	10.98		10.98	
234 Charity Expense	3,874.00		3,874.00	
Total Expenses	\$297,045.50	\$330,875.00	\$ -33,829.50	89.78 %

NET OPERATING INCOME	\$ -946.55	\$0.00	\$ -946.55	0.00%
NET INCOME	\$ -946.55	\$0.00	\$ -946.55	0.00%



Southern Association of Student Financial Aid Administrators
Jenelle L. Handcox/ Budget and Finance Committee Chair
Executive Board Report/July 2022

Committee Members

- TBD

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 established

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
- 2022-2023 Operating Budget presentation
- Mileage reimbursement
 - P&P: 10.6.1.a Mileage
 - Mileage rate shall not exceed IRS business rate in effect on July 1st of each fiscal year.
 - Per IRS: <https://www.irs.gov/newsroom/irs-increases-mileage-rate-for-remainder-of-2022>
 - For the final 6 months of 2022, the standard mileage rate for business travel will be 62.5 cents per mile, up 4 cents from the rate effective at the start of the year.

Mileage Rate Changes

Purpose	Rates 1/1 through 6/30/2022	Rates 7/1 through 12/31/2022
Business	58.5	62.5

- Establish Executive Board Emergency Travel line item and Review Committee
 - For the 22/23 year, the SASFAA Board of Directors acknowledges that there are times when travel costs and/or registration fees can be prohibitive for Committee Chairs and State Presidents to attend meetings. We also recognize the importance of having all members present for Board Meetings and the Annual Conference. For these

reasons, we propose, for the 22/23 year, the establishment of a fund totaling \$4,500 to help with travel costs when these situations occur. The Board will establish a Committee to review requests for funding to help with travel and/or registration costs. The Committee will be made up of the Treasurer, two State Presidents and two Committee Chairs. The members of the Committee will be determined at the July Board Meeting, if possible. Requests will be reviewed on a case by case basis by this Committee in order to facilitate as many people as possible to attend the Board Meetings without creating a financial burden on the SASFAA States or the Committee Chair's school. This Committee may also review other requests as deemed necessary by the President and/or Treasurer, such as exceptions to the travel policy.

Policy & Procedure: Changes/Recommendations:

- None to report

Activity Summary:

- A financial transition meeting was held in conjunction with the GASFAA Conference on Wednesday, June 1. Attendees for the meeting were President Michael Morgan, Treasurer Sarah Baumhoff, outgoing B&F Chair Marian Dill and myself. We also dedicated part of the time to meet with Past President Celena Tulloss and Bookkeeper Jeff Dennis.
- Monthly detailed expense reports are scheduled on the 20th 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 16th 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.
- Truist and Zelle conducted a system update over the weekend of July 23rd. 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.

Outstanding Contractual Obligations:

- None finalized at this time

Balance Sheet:

- The Balance Sheet as of June 25, 2022 is provided below:

Southern Association of Student Financial Aid Administrators

Balance Sheet
As of July 25, 2022

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	
2 BB&T Checking-ACH Only	100.00
BB&T Checking	102,637.91
BB&T Checking-closed Jan 2019	0.00
BB&T Savings	47,917.16
Edward Jones-Money Market	2,812.55
Total Bank Accounts	\$153,467.62
Accounts Receivable	
Accounts Receivable	0.00
Total Accounts Receivable	\$0.00
Other Current Assets	
Advisory Solutions 20/80 @ Edward Jones	467,770.40
Charles Schwab (NASFAA)	395,888.49
Undeposited Funds	0.00
Total Other Current Assets	\$863,658.89
Total Current Assets	\$1,017,126.51
TOTAL ASSETS	\$1,017,126.51
LIABILITIES AND EQUITY	
Liabilities	
Total Liabilities	
Equity	
Opening Balance Equity	757,980.87
Retained Earnings	247,140.64
Net Income	12,005.00
Total Equity	\$1,017,126.51
TOTAL LIABILITIES AND EQUITY	\$1,017,126.51



Southern Association of Student Financial Aid Administrators

Stephanie Miller/ Conference Chair

Executive Board Report/July 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
- 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
-

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 to approve at the July Board Meeting 07/27/2022-07/28/2022

Motion/ Action Item(s):

- Action Item: Executive Board vote to approve committee members

Policy & Procedure: Changes/ Recommendations:

- None at this time

Activity Summary:

- Reviewed the SASFAA Conference Handbook
- Reviewed the SASFAA Policy & Procedures Manual
- Contacted SASFAA VP, Leigh Ann Hussey, to begin discussions for conference pre-cons.
- Contacted US Department of Education to request federal trainers and sessions at the conference.
- Contacted NASFAA to request trainers for sessions at the conference.
- Contacted potential volunteer committee members to discuss obligations and requirements for the conference committee.
- Requested Electronic Services to send the provided email with a link to call for session topics/proposals.



Southern Association of Student Financial Aid Administrators

Geoff Stam / Sponsorship Chair

Executive Board Report/July 2022

Committee Members

The selection process in progress

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 the annual conference
 - Support the Conference Committee with the 60th 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:

In the progress of creating goals and objectives and keep in mind the most recent SASFAA’s Strategic Long-Range Plan and assessment by the 2021-22 GAP Committee.

SLP I: Organizational Structure

GOAL 1: By-Laws – As an appointed member of the Board of Directors, the Sponsorship Chair will complete the annual review of by-laws.

GOAL 3: Policies and Procedures (P & P) – As an appointed member of the Executive Board, as the Sponsorship Chair will support the review of the P & P and contribute to the documentation of review and updates or revisions to the P & P.

GOAL 4: Board of Directors – As an appointed member of the Board of Directors, as the Sponsorship Chair will incorporate the President and SASFAA’s vision in developing the committee's goals and objectives for the year and recommendations for subsequent years.

GOAL 5: Committees– As the Sponsorship Chair will:

- provide the composition of the committee members for Board approval and to be included in the President's annual report.
- Provide any updates to committees making updates to By-Laws and P & P.

GOAL 7 & 8: Membership – As the Sponsorship Chair 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.

SLP II: Communication/Collaboration

GOAL 9: Communication – A As the Sponsorship Chair, in collaboration with the Special Projects Chair (Business Partner Liaison) 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 60th Anniversary Celebrations (i.e. conference, etc.)
- Share Committee Members with Business Partners/Sponsors
- Share special projects and how they can contribute

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.

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

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:

N/A

Activity Summary:

- Met with President to explore his vision of the Special Project and Business Partner Liaison Role
- Met with Special Projects Chair to:
 - Review transition meeting activities
 - Transition Activities overview
 - President’s theme – “Wellness” and Ted Talks
 - Fiduciary responsibilities as members of the Board
 - SASFAA 60th Anniversary
 - [Conflict of Interest Policy](#)
 - [Standing Rules of Engagement & Protocols](#)
 - Confidentiality Acknowledgement
 - Agreed on a collaborative approach for Sponsorship Chair and Special Projects Chair (Business Partner Liaison)
 - Initial review of [2021-22 Sponsorship Opportunities](#)
 - Discuss the need for establishing our committees for Board approval
 - Review the SASFAA Resources available on the website:
 - Past Years [Executive Board Meeting Minutes](#)
 - [SASFAA 2021-22 Services Directory](#) and Sponsorship List
 - [By-Laws](#)
 - [Policy and Procedures Manual](#)
 - [Guide to Financial Management](#)
 - [2021-22 GAP Report](#)
 - [Long Range Plan](#)
 - [Operational Calendar](#) (may sort by role)
 - [Vendor Sponsor Guide](#)
- Upcoming Plans & Activities
 - Send introductory emails to Business Partners to announce the 2022-23 Sponsorship Chair and Business Partner Liaison, future SASFAA events, and upcoming Sponsorship opportunities
 - Meet with the Special Projects Chair (Business Partner Chair) to:
 - develop and review our future communications and calendar/timeline
 - plan the redesign of the Business Partner presence on the website
 - to review and prepare the 2022-23 Sponsorship Opportunities for Board approval.
 - to brainstorm on collaboration opportunities with states and regions.
 - Creation of Sponsorship Committee for Board approval
 - Collaborate and support Special Projects Committee Planning



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

No report submitted.



Southern Association of Student Financial Aid Administrators

Jennifer Davis / Electronic Service

Executive Board Report/July 2022

Committee Members

Jennifer Davis, Chair

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:

- Started the update of the 2022/2023 Board section of the website
- Started the update for the Management Institute and will make it live when directed



**Southern Association of Student Financial Aid Administrators
Wayne Kruger Legislative Relations Committee**

Executive Board Report/July 2022

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

Chair: Wayne Kruger, St. Petersburg College

Alabama: NO RESPONSE

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: Had a meeting with President Morgan to recap the transition meeting and discuss potential goals and determine direction or the year. Emailed state presidents to get the state legislative chairs to form the committee. Continues to practice of having the weekly legislative notice going out to the membership.



Southern Association of Student Financial Aid Administrators

Zachary Christian, Membership Chair

Executive Board Report/July 2022

Committee Members:

TBD Once Volunteer Opportunities Form closes

Committee Goals for 2022-2023:

Continue to maintain the membership database, making improvements when possible to ensure “clean” data; Create a “how to” document for future membership chairs in regard to account merging, and basic maintenance on Membership database within Wild Apricot; Maintain membership tracking documentation to monitor membership trends; continue to increase membership through a Membership Drive; and assist President Morgan with Association Volunteerism.

LRP and GAP Goal Activity to date: None at this time.

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

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

Activity Summary:

1. Continued clean-up of invoices from the May 2021 Auto-Renewal; worked with Treasurer and Bookkeeper to void invoices for those that truly were not members for 2021-2022 and set those accounts to “Lapsed” status
2. Opened Membership Renewal/Membership Year officially on July 15, with renewals being accepted as early as July 1
3. Ongoing: Assisting members with issues of Renewal not extending through July 15, 2023 (Wild Apricot doesn’t process renewals well for those that haven’t been a member in the most recent year – one of the *few* downsides to Wild Apricot)
4. Created Volunteer Opportunities webpage, which includes descriptions of the various committees, and opened the Volunteer Event form in Wild Apricot (set to close on August 31st)
 - a. As of 7.27.22, 64 Members have volunteered. A reminder push is slated to go out on August 1st
5. As of 7.27.22:
 - a. 527 Active Members have renewed and paid Membership
 - b. 6 Associate Members have renewed and paid membership
 - c. Full Membership Tracking will be listed on next Board Report (once non-renewed members lapse after the grace period)



**Southern Association of Student Financial Aid Administrators
Joan Bailey/ Site Selection Chair
Executive Board Report/July 2022**

Committee Members

TBD

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:

- Secure and finalize location for Fall in person board meeting – 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
- Finalize and close out affairs with 2022 conference site
- Conducted site visit to Knoxville for 2023 Conference (along with conference chair)
- Solicit proposals for 2023 conference and 2022 transition meeting

Motion/ Action Item(s):

- To hold Fall training event, Conference committee meeting and board meeting at 2023 conference location at Chattanooga Marriot – Wednesday October 5- Sunday October 9

Policy & Procedure: Changes/ Recommendations: NONE

Activity Summary:

- Finalized negotiation with Marriot, Levy food Services and Chattanooga convention center. Submit contracts for approval and relevant signature
- Negotiated and Secured Chattanooga Marriot contract for the fall training, board meeting and conference committee meeting. Contract is ready for review and relevant signatures.
 - 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.



Southern Association of Student Financial Aid Administrators
Jacquelyn LeSueur/ Equity, Inclusion, & Global Issues Chair
Executive Board Report / July 2022

No report submitted.



Southern Association of Student Financial Aid Administrators

Angela Smith/ Alabama President

Executive Board Report / July 2022

No report submitted.



Southern Association of Student Financial Aid Administrators

Nadine Bailey/FASFAA President

Executive Board Report/July 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:



Southern Association of Student Financial Aid Administrators

David R. McMillion / Georgia President

Executive Board Report/July 2022

Executive Board

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 completed its transition meeting June 16-17. The 2022-2023 Executive Board is as follows

- Elected Positions
 - President: David McMillion
 - Past-President: Angela Tate
 - President Elect: Kristie Teasley
 - Treasurer: Emmilee Mitchell
 - Secretary: Wanda Pickens
 - VP Professional Development: Shannon Simmons
 - Treasurer-Elect: Audra Jimenez
- Appointed positions
 - Partner Member: Cathy Nix
 - Diversity, Equity and Inclusion Chair: Christina Campbell
 - Program Chair: Jessica Alston

- Legislative Affairs Chair: Joe Bucholz
- Membership/Newsletter Chair: Karli Greenfield
- Technology Chair: Melodie Pirone
- Budget and Finance Chair: Pennie Strong
- Leadership Development Chair: Sarah Baumhoff
- Strategic Plan: Maria Hammett

GASFAA will have its fall workshop on the Mercer Macon, GA. campus October 20-21 2022.

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/July 2022

Executive Board

Goals for 2022-2023:

- Develop new website for KASFAA
- Encourage greater attendance at the SASFAA conference from Kentucky, especially since the conference will be drivable for most of Kentucky.

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

Kentucky President Messingschlager has developed his board and assigned volunteers to committees. The first KASFAA board meeting of the 2022-23 year will be held July 29, 2022, in Louisville. Included in the committee assignments was delegating volunteers from Kentucky to fulfill positions within certain SASFAA committees.

President Messingschlager and KASFAA are committed to offering two in-person training conferences again this year and already have contracts in place with the Holiday Inn Louisville East in Louisville, KY, October 12-14 and the Campbell House Hotel in Lexington, KY, April 19-21, 2023.

While developing programming for the fall conference, the President sought to get information about the availability of federal trainers at least for live virtual training. The Atlanta Regional Training Office was slow to respond, so Messingschlager reached out to the Kansas City Regional Compliance Office for suggestions and advise. This lead to a phone conversation between Messingschlager and the national Director of Training for FSA. The conversation was cordial and both parties expressed their concerns and constraints. The Director was forthcoming in sharing his plans to return to in-person federal training in 2024 with a full return to “normal” in 2025. Messingschlager encourages SASFAA to continue voicing their opinion about the need for in-person training, as the Director expressed his support for continued virtual training because of the “on demand” nature and access for all.

Construction is underway for a new KASFAA website, using the same web address, www.kasfaa.com. The old website is very dated and lacks critical functionalities in maintaining efficient processing of membership data and other activity throughout the year. KASFAA will soon manage its own website internally and have the costs of hosting and operating the website sponsored. This will give key members access to data, reports, and the ability to update the website in real time.



Southern Association of Student Financial Aid Administrators

Terry Bland / President for Mississippi

Executive Board Report/July 2022

Executive Board

Goals for 2022-2023:

Business as usual

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

Transition Meeting scheduled for August 2nd via Zoom.

In-Person Meeting scheduled tentatively for September.



Southern Association of Student Financial Aid Administrators

Michelle Hemmer / North Carolina President

Executive Board Report/July 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.

NCASF AA 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 NCASF AA is and what NCASF AA does.
- Financial Stability for NCASF AA by increasing investment options vs CD's.

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

Held our visit meeting July 8th.

- Discussed vision and goals for the upcoming year.
- Board voted on increasing PA membership dues.
- Discussed Fall Conference.
 - Location: Concord/Charlotte
 - Sunday, October 23rd – Wednesday, October 26th
- Started working with board members on goals to implement through the year.
- Working on establishing 22/23 budget & financial stability of the association.



Southern Association of Student Financial Aid Administrators

Missy Perry/ South Carolina President

Executive Board Report/ July 2022

No report submitted.



Southern Association of Student Financial Aid Administrators

Charles Harper / TASFAA President

Executive Board Report/July 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	EdAmercias
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:

TASFAA Transition meeting was held July 21-22, 2022, at the DoubleTree Hotel in Chattanooga, TN. The Board spent time examining how we operate as a non-profit, what are parliamentary procedures, review of policy and procedures, reporting formats, and how the board could enhance training to further member benefits.

In preparation for our 2022-23 year, the board reviewed and discussed the goals President Harper wants to focus on for the year:

TASFAA is working toward a revamped fall training series to be offered across the state's three regions: THEC/TSAC New Aid Officer's training and federal update training, if available. TASFAA is also planning pre-conference events at the TASFAA annual conference to include New Aid Officers' Workshop and workshop designed for leaders/administrators

Upcoming Events

SASFAA Board Meeting: October 8th and 9th

TASFAA Board Meeting: October – Dates and location, TBD

TASFAA Fall Training: October/November – Dates and locations, TBD



Southern Association of Student Financial Aid Administrators

Joe Dobrota / Virginia State President

Executive Board Report/July 2022

Executive Board

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

Goals for 2022-2023:

SASFAA Goals:

- 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:

VASF AA held its annual Board transition meeting June 6-7 in Williamsburg, VA. Slate of Committee Chairs were approved. The 2022-23 budget was approved at this meeting.

VASF AA Board held a monthly update meeting virtually on July 12th. At this meeting, an additional committee chair was approved and a summary of 2021-22

Final contracts were signed to hold the 2022-23 Annual Conference at the Renaissance Portsmouth-Norfolk Waterfront Hotel May 7-10, 2023.

Planning for fall non-conference training in Petersburg, VA as well as the fall director's summit is underway.

VASF AA is transitioning to using a bookkeeper during the 2022-23 year.



Southern Association of Student Financial Aid Administrators

Sandy Neel, Chair Association Governance and Planning

Executive Board Report/July 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 reached out to the previous year's committee members to see if they were willing to serve again this year and all agreed. They were reminded to pay their membership. The Chair started a discussion with the Committee regarding our Long-Range Plan.

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:



Southern Association of Student Financial Aid Administrators
Brenda M. Brown / Special Projects Chair (Business Partner Liaison)
Executive Board Report/July 2022

Committee Members

The selection process in progress

Committee Goals for 2022-2023:

In collaboration with the Sponsorship Chair, will contribute to meeting our 2022-23 goals:

- Increase attendance at the annual conference
 - Support the Conference Committee with the 60th 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:

In the progress of creating goals and objectives and keep in mind the most recent SASFAA’s Strategic Long-Range Plan and assessment by the 2021-22 GAP Committee.

SLP I: Organizational Structure

GOAL 1: By-Laws – As an appointed member of the Board of Directors, as the Special Projects, Business Partner Liaison will complete the annual review of by-laws.

GOAL 3: Policies and Procedures (P & P) – As an appointed member of the Executive Board, as the Special Projects, Business Partner Liaison will support the review of the P & P and contribute to the documentation of review and updates or revisions to the P & P.

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.

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.
- Provide any updates to committees making updates to By-Laws and P & P.

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.

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 60th Anniversary Celebrations (i.e. conference, etc.)
- Share Committee Members with Business Partners/Sponsors
- Share special projects and how they can contribute

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.

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

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:

N/A

Activity Summary:

- Met with President to explore his vision of the Special Project and Business Partner Liaison Role
- Met with Sponsorship Chair to:
 - Share transition meeting activities
 - Transition Activities overview
 - President’s theme – “Wellness” and Ted Talks
 - Fiduciary responsibilities as members of the Board
 - SASFAA 60th Anniversary
 - [Conflict of Interest Policy](#)
 - [Standing Rules of Engagement & Protocols](#)
 - Confidentiality Acknowledgement
 - Agreed on a collaborative approach for Sponsorship Chair and Business Partner Liaison
 - Initial review of [2021-22 Sponsorship Opportunities](#)
 - Discuss the need for establishing our committees for Board approval
 - Shared the SASFAA Resources available on the website:
 - Past Years [Executive Board Meeting Minutes](#)
 - [SASFAA 2021-22 Services Directory](#) and Sponsorship List
 - [By-Laws](#)
 - [Policy and Procedures Manual](#)
 - [Guide to Financial Management](#)
 - [2021-22 GAP Report](#)
 - [Long Range Plan](#)
 - [Operational Calendar](#) (may sort by role)
 - [Vendor Sponsor Guide](#)
- Upcoming Plans & Activities
 - Send introductory emails to Business Partners to announce the 2022-23 Sponsorship Chair and Business Partner Liaison, future SASFAA events, and upcoming Sponsorship opportunities
 - Meet with the Sponsorship Chair to
 - develop and review our future communications and calendar/timeline
 - plan the redesign of the Business Partner presence on the website
 - to review and prepare the 2022-23 Sponsorship Opportunities for Board approval.
 - to brainstorm on collaboration opportunities with states and regions.
 - Creation of BP committee for Board approval

- Creation of Special Project Committee (seek collaboration from Sponsorship Chair, Electronic Services Chair, and Professional Advancement Committee members (i.e. Vice President of Training, Conference Committee Chair, etc.).
- Special Project Committee Planning