

Southern Association
of Student Financial
Aid Administrators
June 2023



Agenda and
Board Reports

Prepared by Secretary Nicole Patrick

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| | | |
|-----------------|--|------------------------------------|
| 11:00 AM | Proposition | |
| 12:00 PM | 2023-2024 Tentative Budget Review | Jenelle Handcox and Carolyn Sparks |
| 1:00 PM | Lunch | |
| 1:30 PM | Calendar Review for 2023-2024 | Daniel Barkowitz |
| 2:00 PM | Webinar/Training plans for 2023-2024 | Katie Conrad |
| 2:30 PM | Parliamentary Procedure | Celena Tulloss |
| 3:00 PM | Review of Strategic Plan | Celena Tulloss |
| 3:15 PM | Break | |
| 3:30 PM | Three duties | Daniel Barkowitz |
| 4:00 PM | Expense Reimbursement, forms, and other admin items | Carolyn Sparks |
| | Open Time | |



Southern Association of Student Financial Aid Administrators

Michael D. Morgan / SASFAA President

Final year report

June 09, 2023

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

Goals Completed

- Increased conference attendance- Conference attendance exceeded 400: Stephanie Miller and the program committee were able to create a welcoming environment that focused on practicing administrators as a whole person (mind, body and soul). With an overall theme of “Breathe” I felt we were able to provide a space for those in attendance to prepare for the challenging years ahead while recognizing the challenges experienced the past two years. The eclectic approach was intentional to try to provide something for everyone.
- Increased membership-membership exceeded pre pandemic
- Increased sponsorship-
 - As of February, there are currently 34 sponsors committed for the SASFAA Annual Conference.
 - Seven (7) new BP’s/Sponsors registered, with several inquiries from new BP opportunities that did not register.
 - Secured more than \$90,000 in conference support.
- Increased collaboration- state reports indicated a willingness to share resources and cross train. Kentucky and North Carolina worked together to change financial strategy of NCASFAA. Florida and Georgia coordinating conferences.
- Monthly meetings- Due to increase workload and daily meetings at Rhodes, I was not able to follow through with this plan ,

Policy & Procedure: Changes/ Recommendations:

We did not initiate changes to policy but spent the year, catching up on documenting policy changes that occurred in the previous “Pandemic” hindered years.

Summary

I have always believed the health of SASFAA can be measured by three things: Training opportunities and attendance; Legislative advocacy and the Annual conference. Of these, the annual conference breathes excitement and life into the organization for the current and following year. I believe Program Committee did an incredible job of setting the association up for success in the coming years through the conference agenda, presentations and opportunities. But initiatives often come with a cost, that is why membership and sponsorship are so important to maintaining a financially sustainable organization. The “ We are SASFAA” culture is crucial to sustainability. The more our sponsors are provided the opportunity to contribute to the association and share their talents as well as money, the more they will support the general membership. The 60th anniversary was a big draw to past presidents. The increased number of past presidents, many retired was heart- warming. As immediate past president I wish to seize this momentum providing a forum to tap into the rich wealth of knowledge this group has to offer. I have been honored to attend many of the state associations in the past two years as president elect and now president. I am in awe of the leadership and creativity of each. The state associations continue to be the strength of the regional association, each bringing its unique talents and demographical perspective to SASFAA.

Finally I would just like to thank the elected members of the board, the state presidents and the selected chairs for successfully carrying out the vision. The association is a success because of the hard work and leadership that each of you have demonstrated this year. I am honored to have had the opportunity to serve with you.



Southern Association of Student Financial Aid Administrators

Daniel T. Barkowitz, President-Elect

Executive Board Report / June 2023

Committee Members

- Conference Co-Chairs for 2024: Melanie Gillespie (SC) and Gail Muse-Beggs (AL)
- See final list of 2023-24 Board below.

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.
 - Built schedule for State President-elect training at SASFAA Conference

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.
- Serving as instructor for SASFAA's Management Institute with a presentation with Phillip Hawkins on Work/Life Balance
- 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.
- Assisting with changes to Website as needed
- Serving as member of FASFAA's Fiscal Affairs Committee
- 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.
- *UPDATED – Ran SASFAA State Presidents Elect Workshop at the SASFAA Conference
- *UPDATED – Served as faculty member for SASFAA's New Aid Officer Workshop offering several general sessions on FAFSA Simplification and as a classroom instructor.
- *UPDATED – Offered several sessions at the SASFAA Conference as well as speaking as part of the Directors Summit pre-conference.
- *UPDATED – Offered remarks as part of passing the gavel at the SASFAA Conference and introduced 2023-24 theme – "Together we make dreams come true"
- *UPDATED – Worked with Conference Chair for 2024 conference and Site Selection Chair to determine site for 2024 Conference. SASFAA Conference for 2024 will be held at Wyndham Grand Orlando Resort at Bonnet Creek, FL from February 25 to February 28 (arrival for Board on Friday, February 23).
- *UPDATED – Finalized committee assignments and roles for 2023-24 SASFAA Board
- *UPDATED – Attended NASFAA Leadership Conference pathway on Association Governance as incoming SASFAA President
- *NEW – Attended VASFAA, MASFAA and FASFAA State Conferences. Offered sessions at all 3 conferences and represented SASFAA with words of welcome at VASFAA and MASFAA.
- *NEW – Convened Budget Planning Group including incoming President-Elect, current President, current Past-President, current Treasurer, incoming Treasurer, Budget and Finance Chair (who is continuing in her role for 2023-24), VP Training, and Bookkeeper to build and review the 2023-24 Budget. Goal (which was achieved) was to build a workable model budget which did not rely on a draw from our reserves and to ensure that the entire group agreed on underlying principles. We will present the draft budget to the new Board at Transition Meeting in June so that we can move quickly to approve the budget in July once the new year begins.
- *NEW – Built webinar planned schedule with incoming VP Training for the 2023-24 year. The schedule will feature a webinar per month for most months in the year with a timely and relevant focus for members as FAFSA Simplification plays out.

- *NEW – Built a calendar for monthly SASFAA Board Meetings during the upcoming year (some virtual in months where we do not meet in person).
- *NEW – Selected location and hotel for Fall SASFAA Management Institute. Working title for theme is “Enrollment Management and Financial Aid: Leading Staff in a Time of Transformative Change”. Meeting will take place in Charleston, SC from October 19-20. October 18 SASFAA will offer a pre-conference FAAC exam prep session. Board meeting will be on October 21 (with arrival October 20 and departure on October 22).
- *NEW – Met with Site Coordinator to walk-through 2024 SASFAA Conference Hotel and meet with hotel staff. During the upcoming transition meeting, new Board members (and departing current board members) will have the chance to tour the hotel as well.

2023-24 Board Members:

- President, Daniel T. Barkowitz, University of Miami (FL)
- Past-President, Michael Morgan, Rhodes College (TN)
- President-Elect, Leigh Ann Hussey, University of West Georgia (GA)
- Vice-President, Katie Conrad, Florida International University (FL)
- Secretary, Nicole Patrick, Mississippi University for Women (MS)
- Treasurer, Carolyn Sparks, Wofford College (SC)
- Conference Committee Co-Chairs, Gail Muse-Beggs, Coastal Alabama Community College (AL) and Melanie Gillespie, Tri-County Technical College (SC)
- Diversity, Equity and Global Issues, Michael Birchett, Collaborate Solutions (KY)
- Communications and Outreach Chair, Michelle Hemmer, NC State Education Assistance Authority (NC)
- Electronic Services Chair, Jennifer Davis, Trident Technical College (SC)
- Legislative Affairs Chair, Rachele Feldman, University of NC Chapel Hill (NC)
- Membership, Sarah Baumhoff, Kennesaw State University (GA)
- Site Coordinator, Joan Bailey, University of South Florida – Health (FL)
- Sponsorship Chair, Biz Daniel, Elm Resources (VA)
- Association Governance, Celena Tulloss (TN)
- Alabama State President, Cierra Smith, Northwest-Shoals Community College (AL)
- Florida State President, Dameion Lovett, University of South Florida (FL)
- Georgia State President, Kristie Teasley, Kennesaw State University (GA)
- Kentucky State President, Michelle Standridge, Spaulding University (KY)
- Mississippi State President, Heather Dearman, Mississippi Gulf Coast Community College (MS)
- North Carolina State President, Rachel Cavenaugh, Cape Fear Community College (NC)
- South Carolina State President, Zachary Christian, SC Higher Education Tuition Grants Commission (SC)
- Tennessee State President, Jennifer Byrd, Nashville State Community College (TN)
- Virginia State President, Ryan McNamara, Central Virginia Community College (VA)
- Task Forces (specially appointed):
 - Partner Advisory Board, Bill Ayers, College Ave Student Loans (FL)
 - Review of Governing Documents, Chad Sartini, Virginia Western Community College (VA)

Submitted with gratitude,

DANIEL T. BARKOWITZ



Southern Association of Student Financial Aid Administrators

Celena Tulloss / Past President

Executive Board Report/June 2023

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
- Presented a full slate of election candidates and award nominees to the Board for consideration
- Announced the election to the SASFAA membership
- Provided the selected name to NASFAA for the Regional Leadership Award
- Completed the SASFAA election and announced results

Motion/ Action Item(s):

All elected positions and committee chairs were asked to provide a position description for review no later than the June 2023 board meeting, these descriptions should be reviewed and approved if sufficient.

Policy & Procedure: Changes/ Recommendations:

P&P 10.3 Waived Expenses

“Those receiving SASFAA awards who are no longer employed (company, self, etc.) in financial aid (school/institution, consulting, business partner, etc.) and who would therefore not be regularly scheduled to attend the conference, may have their conference registration waived and 1 to 2 nights room (dependent on travel needs) covered by SASFAA with approval of the President.

Past Presidents who are no longer employed (company, self, etc.) in financial aid (school/institution, consulting, business partner, etc.) and are actively involved in the conference with presenting and/or conference duties may receive a free conference fee at the discretion of the President. A Past President who meets this qualification may make a request to the President or it may be requested by the conference chair.”

Activity Summary:

- Attended the NASFAA Regional Presidents Meeting via Zoom, August 11, 2022
- Attended the NASFAA Regional Presidents Meeting via Zoom, October 25, 2022
- Attended the NASFAA Board Meeting via Zoom, October 26, 2022
- Attended the NASFAA State and Regional Investors Call via Zoom, December 2, 2022
- Attended the NASFAA Board Meeting, Scottsdale, AZ, December 5, 2022
- Attended the NASFAA Board Meeting via Zoom, February 1, 2023
- Call for Nominations email was sent to the listserv in September 30, 2022 with a deadline of October 21, 2022. The ballot was presented and accepted by the Executive Board during the October 24, 2022 board meeting for candidates for President-Elect, Vice President and Treasurer.
- An election announcement was released to the membership on January 5, 2023 presenting the candidates. Election website information for each candidate was posted to SASFAA’s website in January.
- Election polls opened for active, paid, and qualified SASFAA members on February 4, 2023 and closed on February 14, 2023 at 3:00 p.m. EST. Election results were announced during the business meeting held on Wednesday morning, February 15, 2023. The following candidates were elected to serve:
 - Leigh Ann Hussey- GA-President-Elect
 - Katie Conrad- FL-Vice President
 - Carolyn Sparks- SC- Treasurer
- Attended the NASFAA Regional Presidents Meeting via Zoom, February 22, 2023
- Attended the NASFAA Awards Committee Meeting via Zoom, March 3, 2023
- Attended the NASFAA Board Meeting via Zoom, March 23, 2023
- Attended the NASFAA Regional Presidents Meeting via Zoom, May 11, 2023
- Attended the NASFAA Board Meeting via Zoom, May 26, 2023
- Represented SASFAA at the GASFAA annual conference, May 31-June 1, 2023, Lake Lanier, GA
- Working with potential vendors to secure a new, personalized SASFAA gavel.



Southern Association of Student Financial Aid Administrators

Leigh Ann Hussey / Vice President

Executive Board Report/June 2023

Committee Members

Management Institute – Sandy Neel (Chair), Kathy Bialk, Heather Boutell, Michael Gantt
New Aid Officer Workshop – Katie Conrad (Curriculum Coordinator), Carolyn Sparks (Site 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:

The SASFAA New Aid Officer Workshop was held June 4-9. Instructors and Staff reported on June 2nd to prepare for the 130 attendees to arrive on June 4th. We had a long wait list for the workshop, but we were able to make space for everyone by increasing each class size by 1 person and through a few cancellations. The instructors and staff did a spectacular job throughout the week, and attendees spoke highly of the entire event. We are in the process of putting together an evaluation to send to all attendees to get formal feedback.



Southern Association of Student Financial Aid Administrators

Nicole Patrick / Secretary

Executive Board Report/June 2023

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

LRP and GAP Goal Activity to date:

n/a

Motion/ Action Item(s):

n/a

Policy & Procedure: Changes/ Recommendations:

- Section 3.5 Archives
- Section 12.2.4 Leadership Seminars (needs updating)
- Section 12.2.5 Mid-Level Workshop Sites (needs updating)
- Section 6.16.1 (formatting ?)

Activity Summary:

- *Completed minutes for February 11, 2023 meeting
- *Completed minutes for March 9, 2023 virtual meeting
- *Completed minutes for May 2, 2023 virtual meeting
- *Completed minutes for May 15, 2023 virtual meeting
- *Completed the updates for number of members that voted, recent award recipients, the passing of Guy Gibbs, and conference and workshop site information.



Southern Association of Student Financial Aid Administrators

Sarah Baumhoff/Treasurer

Executive Board Report/June 2023

Committee Members

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):

Recommendation that the Treasurer be the primary “owner” of the QuickBooks account, not the Bookkeeper.

Policy & Procedure: Changes/ Recommendations:

None

Activity Summary:

1. Assisted with Financial Review in May with Budget and Finance. Identified and working to resolve several issues:
 - a. The Bookkeeper will be creating a SASFAABookkeeper@gmail.com. They will not use the SASFAATreasurer@gmail.com email address any longer. It will be maintained and worked by the SASFAA Treasurer.

- b. Log in information for the Truist accounts will be shared with the Treasurer. Previously the Bookkeeper changed the log in information and did not share it with the Treasurer. Truist will only provide one log in, so this information must be shared and changes communicated between the Bookkeeper and the Treasurer.
 - c. Reimbursed the Bookkeeper who personally paid for the State of Georgia incorporation fees for SASFAA rather than having SASFAA pay these expenses.
- 2. Truist Accounts (If SASFAA stays with Truist)
 - a. To change the names/signers on the account, Past President Tulloss must be present as she is currently the Controlling Person on the accounts. SASFAA needs to decide who the Controlling Person should be – it may need to be the Treasurer since that only changes every two years.
 - b. After several escalated conversations with Trust, they have agreed that we can do an appointment at locations in the relevant state at the same time and they will call within the branches to change the signers.
 - c. For Credit Cards to be issued, individuals must be on the Business Resolution with Truist. To add someone to the Business Resolution, they must appear in person.
 - d. They **might** be able to accommodate an e-signature process but everyone must have access to the email address at the same time.
- 3. Florida Tax Exempt Status- tax exempt status expired on March 31st. Information has been submitted and we have applied for our status to remain valid. It appears that this is automatically renewed if they had our correct address on file.
- 4. All expense requests must be sent to the SASFAABookkeeper@gmail.com and SASFAATreasurer@gmail.com email addresses. Please do not send requests to the Bookkeepers personal email address. The forms will be updated to reflect this. This will ensure the Treasurer is approving any expenses before they are reimbursed.
- 5. Audit/Tax Firm – had meeting/discussion with Walz Group who came highly recommended by EASFAA. Information will be provided to Budget and Finance Chair and new Treasurer about moving to this firm to file taxes each year and potentially audit SASFAA’s books in the future. This can presented for consideration by the 23/24 Board.
- 6. Moving Banking Institutions
 - a. Due to the issues with Truist, we have investigated several options for consideration:
 - i. Fifth Third Bank - regional bank, offers special options/pricing for non-profits. Locations are limited in some states for in-person banking. States they can accommodate setting up accounts online, changing signers remotely/electronically, offers credit card options.
 - ii. Chase – national bank. Locations are limited in some states for in-person banking. States they can accommodate setting up all services virtually/online, as well as changing signers yearly, offers credit card options.
 - iii. Bluevine – totally online bank, specializing in business accounts. Everything is set up online. Do not appear to offer credit card options. Would require all mobile options.
- 7. Credit Cards – if we use a bank that offers credit cards, that is an option for moving forward. If not, we need to explore another option for credit cards that do not require a guarantor on the account.
- 8. Thank you for the opportunity to serve SASFAA over the last 3 years. It has been a pleasure to serve the organization and give back to an organization that gives so much to so many. Thank you for your patience with me as I learned the role and as we have worked to determine what works best for SASFAA between the Bookkeeper and Treasurer.



Southern Association of Student Financial Aid Administrators

Jenelle L. Handcox/ Budget and Finance Committee Chair

Executive Board Report/June 2023

Committee Members

- Committee Members
 - Sarah Baumhoff, Treasurer
 - Carolyn Sparks

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 approved
- 2223 operating budget posted to website
- Year End Committee Report submitted

Allocation of Assets: See balance sheet below (excluding prepaid expenses/deposits)

| | | |
|---|---------------|---------------|
| Operating Funds (15-25% target) – Bank Accounts | \$ 183,558.37 | Currently 17% |
| Short Term (30-45% target) – Advisory Solutions | \$ 466,219.10 | Currently 44% |
| Long Term (30-45% target) – Charles Schwab | \$ 407,931.13 | Currently 39% |

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) | \$ 1,057,709 |
| Prior Year Ending Budget | \$ 297,046 |
| Outstanding Contractual Agreements | \$ 370,999 |
| Balance | \$ 389,664 |
| 20% maximum transfer from assets | \$ 77,933 |

Motion/Action Item(s):

- In the GFM, add following text to 5.1 Contracts with Meeting Facilities
 - e. Assignment of any Rewards Points states “Sitting President at the time of event”

Policy & Procedure: Changes/Recommendations:

- None to report

Activity Summary:

- 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.
- Guide to Financial Management updated to include changes approved by the 20-21 and 21-22 Executive Boards
- Year End LRP/GAP Report submitted
- Budget & Finance Chair job description updated and submitted
- Bookkeeper job description updated and submitted
- Per Past President Tulloss, the two Past President Scholarships provided to her have been awarded to two deserving University of Tennessee students.

Outstanding Contractual Obligations:

- **Embassy Suites by Hilton Orlando – Lake Buena Vista Resort**, 2023 Transition Meeting, 6/16/2023 – 6/19/2023, \$17,105
 - Room rate is \$159 plus 12.5%
 - 85 contracted room nights
 - \$1900 food and beverage minimum
 - Resort fee waived; includes Wi-Fi, Disney World shuttle
 - 1/40 complimentary room ratio
 - Complimentary meeting space
 - Group rates available 2 days pre and post meeting dates, based on availability
 - Discounted self-parking rate of \$12.00 (reduced from \$17.00)
 - \$1500 non-refundable deposit paid in November 2022**Total liability: \$17,105**
- **Embassy Suites by Hilton - Charleston Convention Center**, Professional Development & Board Meeting, 10/17/2023 – 10/22/2023, \$29,894
 - Room rate is \$159 plus 14%
 - 88 contracted room nights
 - \$3500 food and beverage minimum
 - Meeting room rental fee waived
 - 1/40 complimentary room ratio
 - Complimentary Wi-fi in guestrooms
 - Complimentary overnight parking in hotel lot
 - 15% discount on in-house audio visual
 - \$10 rebate for each sleeping room night credited to master account
 - Group rate available 2 days pre/post, subject to availability
 - Attrition at 80%
 - Hilton Honors points for designated official

Total liability: \$29,894

- **Wyndham Grand Orlando Resort – Bonnet Creek, Annual Conference, 2/23/2024 – 2/28/2024,**
\$324,000
 - Room rate is \$249 plus 12.5%
 - 1000 contracted room nights
 - \$75,000 banquet food and beverage minimum
 - \$5 rebate for each sleeping room night credited to master account
 - 1/40 complimentary room ratio
 - Resort fee of \$38 discounted to \$10 for all guest rooms in Group block
 - Meeting room rental fees waived
 - Complimentary Presidential Suite upgrade at the group rate
 - Discounted Hospitality Suite at the group rate
 - Up to 5 Staff Rooms discounted at \$30 off the group rate
 - 8 complimentary rooms upgraded to suites at the group rate
 - Complimentary access to fitness center, pools, hot tubs, miniature golf & shuffleboard
 - Complimentary basic Wi-Fi in guest rooms & meeting space
 - Discount on audio visual of 10%
 - Group rate available 3 days pre/post subject to availability
 - Self-parking discounted to \$15 per night
 - Shuttle Service to Disney Parks and Disney Springs
 - Attrition at 80%
 - 30 complimentary 6ft exhibition tables
 - 10 shipping boxes received complimentary
 - Wyndham Rewards points for designated official

Total liability: \$324,000
- **Hyatt Regency Greenville, Annual Conference, 2/14/2025 – 2/19/2025**
 - Contract pending further negotiations

Balance Sheet:

- The Balance Sheet as of June 9, 2023 is provided below:

Southern Association of Student Financial Aid Administrators

Balance Sheet

As of June 9, 2023

| | TOTAL |
|---|-----------------------|
| ASSETS | |
| Current Assets | |
| Bank Accounts | |
| 2 BB&T Checking-ACH Only | 100.00 |
| BB&T Checking | 132,670.97 |
| BB&T Savings | 47,921.57 |
| Edward Jones-Money Market | 2,865.83 |
| Total Bank Accounts | \$183,558.37 |
| Accounts Receivable | |
| Accounts Receivable | 0.00 |
| Total Accounts Receivable | \$0.00 |
| Other Current Assets | |
| 6 Prepaid Expenses | 18,750.00 |
| Advisory Solutions 20/80 @ Edward Jones | 466,219.10 |
| Charles Schwab (NASFAA) | 407,931.33 |
| Undeposited Funds | 0.00 |
| Total Other Current Assets | \$892,900.43 |
| Total Current Assets | \$1,076,458.80 |
| TOTAL ASSETS | \$1,076,458.80 |
| LIABILITIES AND EQUITY | |
| Liabilities | |
| Total Liabilities | |
| Equity | |
| Opening Balance Equity | 757,980.87 |
| Retained Earnings | 246,090.64 |
| Net Income | 72,387.29 |
| Total Equity | \$1,076,458.80 |
| TOTAL LIABILITIES AND EQUITY | \$1,076,458.80 |

Cash Basis Friday, June 9, 2023 09:05 AM GMT-04:00



Southern Association of Student Financial Aid Administrators

Stephanie Miller – Conference Committee Chair

Executive Board Report/June 2023

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)
 - Business Partner/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)
 - Equity, Inclusion, and 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:

P&P: 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;

- The Conference Committee included members from professional advancement, budget and finance, membership and local arrangements.
- solicit proposals to develop general and interest sessions and secure speakers that appeal to the various sectors and experience levels of the membership;
 - Conference call for sessions was solicited via email and google form
 - Conference sessions were reviewed to ensure appeal to various sectors and experience.
 - While not advertised, the conference did have a director track with a director level session in every concurrent session block.
- review evaluations from the prior year conference to assess interest and need for appropriate adjustments for current conference plans;
 - This was completed during conference planning.
- plan pre-conference workshops and seminars that address the needs of different segments of the membership;
 - Leigh Ann, SASFAA VP, chose pre-conference workshops for certification of members. NASFAA offered SASFAA to host the inaugural NASFAA FAAC ® Training Session.
- assist in developing the conference budget and adhere to the approved budget;
 - The budget was developed based on last year's expenses.
 - This year we have increased expenses with the 60th anniversary, the 'big game', and the Valentine's Day in addition to an increase in the number of attendees and business partners.
 - The conference expense was over the 206 budgeted line for the conference committee dollar amount due to the 60th Anniversary, Superbowl Party, Valentine's Day, and the conference t-shirt expense.
 - The final billing was just determined on 3/27/2023.
- secure volunteers to help perform the duties of the committees;
 - The Conference Committee solicited assistance from the membership via email
- maintain all related correspondence and materials; (8) prepare a conference evaluation for use by the next conference chair;
 - Our mobile app, SCHED, allowed a brief 'real time' session evaluation that has been provided to the 2024 Conference Co-Chairs.
 - In addition, a survey will be sent to the attendees that will be shared to the 2024 Conference Co-Chairs.
- provide conference announcements, news articles and promotional materials to the Communications and Outreach committee for publication to the membership;
 - Announcements have been distributed by email and social media.
- report on activities and present reports to the Board
 - Board reports have been submitted and presented for each meeting

P&P: 5.3 President Elect

- (3) conducts an orientation session at the annual conference for state Presidents-elect
 - The State President-Elect Workshop was held as a pre-conference session on Sunday, February 12, 2023.

P&P: 5.5 Treasurer

- (7) serves as ex-officio member to the Annual Conference Committee, the Budget and Finance Committee, and all other committees associated with professional development training;
 - The Treasurer is an ex-officio member for the Annual Conference Committee

P&P 5.6 Secretary

- (8) prepares and submits meeting minutes with supporting documents and publications, including annual conference programs, special reports, and membership directories to archives;
 - The Conference Committee Chair will ensure the Secretary receives a copy of the annual conference program for the minutes and archives.
 - The Conference Program was sent to the Secretary. It was also archived on the website. In addition, Brenda Brown, the Business Partner Liaison was tasked by Michael Morgan with a special project video compilation of the conference that is still in progress.

P&P: 6.8 Legislative Relations

- (6) Assist conference committee in planning interest sessions for the annual conference on legislative or regulatory issues including those affecting state grant or support agencies;
 - The Conference Committee worked with the Legislative Relations Chair to host a session during the annual conference; however, the Legislative Chair decided a webinar would best suit the goals of the Legislative Relations Committee.

P&P: 6.11 Membership

- (1) work with the treasurer and electronic services chair in developing membership forms and provide input to the conference chair to develop conference forms.
 - The Conference Committee worked with the Membership Chair to assist with the name badges and numbers for the silent auction.

P&P: 6.16 Business Partner

- (4) serve as the liaison to the conference committee for sponsorship needs and effective use of Sponsor or spaces;
 - The Conference Committee has worked hand in hand with the Business Partner/Sponsorship Chair & Business Partner Liaison.

P&P: 6.16.1 Business Partner

- The conference chair will attempt, provided adequate space is available, to ensure that conference breaks and/or continental breakfasts will be held in the sponsorship area.
 - The Conference Committee worked hand in hand with the Business Partner/Sponsorship Chair to provide space and breaks in the sponsorship area.

P&P: 6.19 Equity, Inclusion, and Global Issues

- Provide recommendations to the Conference Committee for pertinent subject matter and training for conferences regarding diversity. Provide pertinent information via the SASFAA website, e-mail, and SASFAA Nine News regarding multicultural matters.
 - The Equity, Inclusion, and Global Issues Chair is a member of the Conference Committee and provided sessions for the conference.

P&P: 8.1.3 Annual Conference Program

- The annual conference program will be distributed to each person who attends the annual conference and should include the following information:
 - a. letter from the President;
 - Included
 - b. letter from the Conference Chair;
 - Included

- c. names of members of the current elected officers, state association presidents, committee chairs, liaisons, members of the conference committee, and members of the local arrangements committee;
 - Included
 - d. daily schedule of sessions, events and activities;
 - Included
 - e. brief description of each of the sessions, events and activities;
 - Included
 - f. names and titles of speakers, moderators and presenters;
 - Included
 - g. locations of sessions, events and activities;
 - Included
 - h. diagrams showing the locations of the sessions, events and activities;
 - Included
 - i. brief biographical sketches of persons providing major addresses or presentations;
 - Included
 - j. announcement of the dates and location of the subsequent year's conference.
 - Was not announced as it was voted to hold the 2024 Conference in Orlando after the Annual Conference.
- The conference chair will attempt, provided adequate space is available, to ensure that conference breaks and/or continental breakfasts will be held in the sponsorship area.
 - The Conference Committee worked hand in hand with the Business Partner/Sponsorship Chair to provide space and breaks in the sponsorship area

P&P: 10.2 Conference, Events and Workshop Fees

- The Annual Conference Fees
 - The Budget and Finance Chair will consult with the Conference Committee to propose the annual conference budget. The annual conference budget will consider the annual conference fee, anticipated participant and sponsorship revenues, hotel and event contractual obligations, and other related income and expense items.
 - The Executive Board discussed the fees, obligations, and income and expenses to determine the fee structure for the annual conference.

P&P: 11.1 Conferences and Conference Planning

- 11.1.1 Training at the Annual Conference: The conference committee will coordinate all training activities held in conjunction with the annual conference.
 - Completed during the conference
- 11.1.4 Ex-Officio Members Ex-officio members to the conference committee are the treasurer, Business Partner Chair, and membership chair.
 - All of the above were included as ex-officio members of the Conference Committee.

P&P: 11.6 Honoraria

- 11.6.1 Annual Conference Honoraria shall be paid by SASFAA and charged to the annual meeting account for speakers and presenters, upon recommendation of the conference chair and approved by the president and treasurer.

- Several honoraria will be paid for presenters at the annual conference.
 - Jazz Band, Phi Beta Sigma Fraternity, Singers of Lee, UTC ROTC, UTC Massage Therapy Program

LRP and GAP Goal Activity to date:

LRP Section I:

- **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 sessions consider public, private, 2-year, 4- year, public, private and graduate/professional schools. Sessions also included clock to credit hour calculation, ‘Ask A Colleague’ with multiple SIS software and regulations. General and concurrent sessions were given by FSA, NASFAA and the membership that covered hot topics: Mental Health, DEI, COA regulations, and FAFSA Simplification.
- **Provide services and resources that meet the needs of all sectors.**
 - Conference sessions considered public, private, 2-year, 4- year, public, private and graduate/professional schools. Sessions included clock to credit hour calculation, ‘Ask A Colleague’ with multiple SIS software and regulations. General and concurrent sessions were provided by FSA, NASFAA and the membership that covered hot topics: Mental Health, DEI, COA regulations, and FAFSA Simplification.

LRP Section III:

- **Continue to use evaluation feedback, membership surveys and national trends to develop training topics and programs.**
 - With the use of the SCHED mobile app, sessions will be evaluated in ‘real time’ by a brief choice of session usefulness and a section for comments.
 - The membership will be sent an evaluation of the full conference and the use of the SCHED mobile app.
 - Prior to the conference the membership was sent a request for proposals that also included a request for topics for training.
 - sessions will be given by FSA, NASFAA and the membership that will cover hot topics such as new COA regulations, and FAFSA Simplification.
 - SCHED Survey results were sent to the incoming Conference Co-Chairs.
 - Final Conference Survey results will be sent to the incoming Conference Co-Chairs once the survey ends.

Old Business Completed:

- **COMPLETED** and sent to Electronic Services Chair and Secretary for update. The Conference Committee would like to recommend that the Conference Guidebook reflect that the President chooses the charity keeping in mind the location of the conference.
 - This will be added to the Conference Guidebook (October Board Meeting Report)
 - The as reasonable expense for the hospitality suite alcohol will also be added. (New item)

- Add to the P&P and/or Conference Guide – The last date to cancel a registration should coincide with the last day to register online for the annual conference.
 - Completed and sent to the Electronic Services Chair and Secretary for update. Changed in the Conference Guidebook and sent to Secretary and Electronic Services to update on web.
- Complimentary annual conference registration for Past Presidents and Award Recipients was reviewed by Celena and I. Celena will make recommendation at the June Board meeting.

Motion/ Action Item(s):

- Discussed last board meeting - Add to the P&P – The last date to cancel a registration should coincide with the last day to register online for the annual conference.
 - NEEDS to be added in the P&P Section 11.
- Appendix D: Sponsorship Opportunities should be updated to coincide with the current sponsorship information.

Activity Summary:

- The Annual Conference was a success. The final survey was emailed to the attendees. At this time, it is still active so I do not have any updates from the survey.
- **Goals not completed**
 - The only goals that were not/have not been met regarding the P&P & LRP
 - An announcement of the location of the 2024 conference was not made as the site had not yet been chosen. It has since been chosen and the membership notified via email.
 - Expenses exceeded the 206 Conference Committee Budget Line; however, we had more attendees than anticipated.



Southern Association of Student Financial Aid Administrators

Geoff Stam / Sponsorship Chair

Executive Board Report/June 2023

Committee Members

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 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:

None currently

Activity Summary:

- Secured \$88,300 in sponsorship for the 2023 Annual SASFAA Conference. This included 7 new Business Partners, a total of 34 Business partners.
- Worked with the Conference Chair and Conference Committee to execute the Annual conference in February 2023 and accommodate the needs of the Business Partners during the conference.
 - Established floor plan layout for BPs and worked with each organization to accommodate for the conference vending area.
 - Assisted in the coordination of silent auction items with the BPs for those that did not have an item with them.
- Provided all updated Business Partner information to the Business Partner Advisory Group and Irma Molinas who was constructing the SASFAA Business Partner Services Directory.
- Completed the “Job Description Summary” for the Business Partner/Sponsorship Chair and presented to the Board.
 - Attend the June 2023 SASFAA Executive Board Meeting in Orlando on 6/17
 - Transition the activities and goals of the Sponsorship Committee Chair to the incoming Chair, Biz Daniels
 - Other activities as requested by the Executive Board



Southern Association of Student Financial Aid Administrators

April Tretter Communications & Outreach Chair

Executive Board Report/June 2023

No report submitted.



Southern Association of Student Financial Aid Administrators

Jennifer Davis Electronic Services Committee Chair

Executive Board Report/June 2023

No report submitted.



Southern Association of Student Financial Aid Administrators

Wayne Kruger Legislative Relations Committee

Executive Board Report/June 2023

Committee Members

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, ELFI

Virginia: Laurie Owens, Virginia Community College System

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. Continued to have monthly meetings with the committee and sharing state bills so they can compare and prepare if its introduced in their state.
2. Pivoted to having a webinar on the upcoming changes to the SAI and Pell done by Daniel and Rachelle.
3. Completed the job description for the legislative chair position.



Southern Association of Student Financial Aid Administrators

Zachary Christian, Membership Chair

Executive Board Report/June 2023

Committee Members:

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 – Wrapping up for year-end; Working with SASFAA Bookkeeper to accurately adjust accounts for those who pay Non-Member fees to attend SASFAA Events – COMPLETE; Assisted members with the renewal process, ensuring invoices and membership certificates are providing as requested – COMPLETE; 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) -COMPLETED; 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 – COMPLETED.

2022-2023 Membership Data (As of June 9, 2023):

| | <u>2021-2022</u> | <u>2022-2023</u> | <u>%Change</u> | <u>Number Change</u> |
|--------------|-------------------------|-------------------------|-----------------------|-----------------------------|
| Active | 1246 | 1280 | 2.73% | 34 |
| Associate | 10 | 23 | 130.00% | 13 |
| Honorary | 19 | 21 | 10.53% | 2 |
| Retired | 0 | 0 | - | 0 |
| Total | 1275 | 1324 | 3.84% | 49 |
| Alabama | 128 | 90 | -29.69% | -38 |
| Florida | 149 | 219 | 46.98% | 70 |
| Georgia | 242 | 219 | -9.50% | -23 |
| Kentucky | 62 | 69 | 11.29% | 7 |
| Mississippi | 52 | 61 | 17.31% | 9 |

| | | | | |
|--------------------------------------|-------------|-------------|---------|-----|
| North Carolina | 132 | 131 | -0.76% | -1 |
| South Carolina | 184 | 181 | -1.63% | -3 |
| Tennessee | 120 | 151 | 25.83% | 31 |
| Virginia | 136 | 141 | 3.68% | 5 |
| Other | 70 | 62 | -11.43% | -8 |
| Total | 1275 | 1324 | | |
| | | | | |
| Public (4 Year) | 403 | 453 | 12.41% | 50 |
| Private non-profit (4 Year) | 326 | 359 | 10.12% | 33 |
| Public (2 Year) | 303 | 261 | -13.86% | -42 |
| Other | 50 | 44 | -12.00% | -6 |
| Graduate/Professional | 31 | 33 | 6.45% | 2 |
| Government Agency | 19 | 17 | -10.53% | -2 |
| Lender | 30 | 27 | -10.00% | -3 |
| Consultant | 18 | 28 | 55.56% | 10 |
| Guaranty Agency | 10 | 12 | 20.00% | 2 |
| Servicer | 13 | 16 | 23.08% | 3 |
| Private non-profit (2 Year) | 21 | 23 | 9.52% | 2 |
| Not Specified | 14 | 12 | -14.29% | -2 |
| Private for profit (Business School) | 6 | 9 | 50.00% | 3 |
| Private for profit (Technical/Trade) | 23 | 17 | -26.09% | -6 |
| Secondary Market | 2 | 2 | 0.00% | 0 |
| Retired Financial Aid Professional | 5 | 9 | 80.00% | 4 |
| Health Related/Nursing | 1 | 2 | 100.00% | 1 |
| Total | 1275 | 1324 | | |
| | | | | |
| Male | 289 | 295 | 2.08% | 6 |
| Female | 926 | 954 | 3.02% | 28 |
| Not Specified | 60 | 75 | 25.00% | 15 |
| Total | 1275 | 1324 | | |
| | | | | |
| White/Caucasian | 754 | 778 | 3.18% | 24 |
| Black/African American | 345 | 341 | -1.16% | -4 |
| Not Specified | 108 | 107 | -0.93% | -1 |
| Hispanic/Chicano/Mexican American | 44 | 73 | 65.91% | 29 |
| Asian/Pacific Islander/Filipino | 22 | 22 | 0.00% | 0 |
| Native American | 2 | 3 | 50.00% | 1 |
| Total | 1275 | 1324 | | |
| As of date: | 6/30/2022 | 6/9/2023 | | |



Southern Association of Student Financial Aid Administrators
Joan Bailey/ Site Selection Chair
Executive Board Report/June 2023 2023

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
- Elizabeth Daniels – Business Partner – Female (white/Caucasian) - VA

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
 - Annual Conference 2025

SASFAA LRP and GAP Goal Activity to date:

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

- 2023 transition meeting proposal received from Embassy Suites Orlando and contract executed.
- Solicit proposals for annual conference – 2024 & 2025
 - 2024 – Wyndham Bonnet Creek contract executed
 - Site visit to Wyndham Bonnet Creek
 - 2025 - Hyatt Regency Greenville – awaiting contract (requesting additional concessions)
- Solicit proposals for Fall Training and Board Meeting – Embassy Suites Charleston was selected, and contract executed.
- Finalize activities to facilitate the 2023 transition meeting.

Motion/ Action Item(s):

- None

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.
- 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 – contract executed.
- Solicit proposals for 2024 & 25 conference. See above
- Review and approved all event orders for 2023 conference and approved bill payment
- Review and approve event orders – transition meeting
- 2024 Annual Conference/2023 Fall training site selection completed, and contracts executed.
- All goals completed!



Southern Association of Student Financial Aid Administrators

Jacquelyn LeSueur/ Equity, Inclusion, & Global Issues Chair

Executive Board Report / June 2023

Committee Members

Rhonda Bryant- University of Kentucky

Nancy Ferguson- University of Georgia

Karissa Lawson- University of Central Florida

Kala Hudson- Converse University

Zelotes Smith- University of Georgia

Lisa Davall- Georgia Military College

John Michael Scott- James Madison University

Stacy Baker- Georgia Northwestern Technical College

Zachary Christian- SC Higher Education Tuition Grants Commission

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:

Motion/ Action Item(s):

- 1) Update 6.19 Equity, Inclusion, and Global Issues in the Policy and Procedure Manual to add bullet point four to read:
 - (4) Oversees the Annual SASFAA Diversity Leadership Program.
- 2) Adopt the Diversity Leadership Program Handbook

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

Equity, Inclusion & Global Issues Committee:

- **February:** Information sent out to the SASFAA Community in celebration of Black History Month where we celebrated the first African American State President of each state that make up SASFAA.
- **March:** Information sent out to the SASFAA Community in celebration of Women’s History Month that celebrated the first woman to earn a bachelor’s degree which so happen to all be a part of the SASFAA reason as well as spotlighting the first female SASFAA president, Eunice L. Edwards from Fisk University which was written by Nancy Ferguson FAAC® who is a member of the Equity, Inclusion & Global Issues Committee.
- **April:** Join NCASFAA to share on their virtual Conference on diversity in partnership with Inceptia.
- **May:** Information sent out to the SASFAA Community in celebration of AAPI Heritage month written by written by Nancy Ferguson FAAC®.
- **May:** Understanding Diversity, Equity, & Inclusion (DEI) Webinar with Dr. Quincy Jenkins of Chattanooga State and Ms. Stacy Lightfoot of the University of Tennessee at Chattanooga.

Diversity Leadership Program

- Check-in with the participants in March and May
- Opened the SASFAA Diversity Leadership Program Application on May 1. Closing date for the application was May 31st.
- **May 31st:** Met with Membership Chair, Zachary Christian, and incoming Equity, Inclusion and Global Issues Chair, Michael Birchett, to discuss the Diversity Leadership Program. In addition, adding bullet point four to section 6.19 of the Policy and Procedure Manual. Lastly, providing information to draft a Diversity Leadership Program Handbook that will need to be reviewed and updated annually by the Equity, Inclusion and Global Issues Chair.
- Received seven applications Two individuals missed the deadline but shared that they would be applying on next year.
- Sent packets of applicants to President-Elect on June 1. Deadline to submit application rankings was Friday, June 9th.
- The 2023-24 Diversity Leadership Program Participants are:
 - (1) **J. Jonathan Ibarra- North Carolina**
 - (2) **Shawndelea Hudson- South Carolina**
 - (3) **Dominique Maddux-Jackson- Virginia**



Southern Association of Student Financial Aid Administrators

Angela Smith/ State President-Alabama

Executive Board Report/June 2023

Executive Board

Goals for 2022-2023:

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

April 24-25 2023 AASFAA Spring meeting

2024-2025 Elections held: finalized May 24, 2023



Southern Association of Student Financial Aid Administrators

Nadine Bailey / FASFAA President

Executive Board Report – Final/June 2023

Executive Board

FASFAA 2022-2023 Executive Board

Elected Positions:

- President: Nadine Bailey (UMA)
- Past-President: Katie Conrad (FIU)
- President Elect: Dameion Lovett (USF)
- Treasurer: Kylie Gross (UT)
- Secretary: Susan Ambridge (Valencia College)
- VP Training: Jessica Ly (FIU)
- Treasurer-Elect: Arminta Johnson (Lake Sumter)
- Region I Representative: Angelica Coonts (Pensacola State)
- Region II Representative: Alisha Hunt (Santa Fe College)
- Region III Representative: Angelica Parrales (Valencia College)
- Region IV Representative: Jerry McMahon (Keiser University)
- Region V Representative: Chrissy Gass (FAU)

Appointed positions:

- Conference Co-Chair: Alicia Keaton (UCF)
- Conference Co-Chair: Sheia Pleasant-Doine (Flagler College)
- Federal and State Legislative Chair: Jonathan Reynolds (UMA)
- Business Partners Advisory Council Chair: Laura Dickerson (Sallie Mae)
- Vendor/Sponsorship Chair: Becky Davis (Asendum)
- Site Selection/Event Coordinator: Irma Molinares (College Ave Services)
- Electronic Services: Eddie Schworn (FIU)
- Early Awareness/Outreach/Financial Literacy Chair: Alex Yates (UNF)
- Membership Chair: Tamika Martin (Valencia)
- Scholarship/Charity Chair: Tracy Wiles (UT)
- Grad/Professional: Melissa Toohey (USF Health)
- Vocation-Technical/Clock Hour Chair: Kim Phillips (SPC)

- OSFA Outreach Liaison: Pete Hernandez (OSFA)
- Private Schools Liaison: Vandeen McKenzie (Embry-Riddle Aeronautical University)
- Global Issues: Egan Hanson (Schiller University)
- Social Media/Communications Coordinator: Lindsey Dickerson

Goals for 2022-2023:

- Find training alternatives to FSA training for workshops and conferences.
- Increase Membership by offering various training opportunities.
- Expand our social media presence on Facebook, LinkedIn, Instagram, and Twitter.
- Ensure we meet the goals of the strategic plan.
- Honour the past, appreciate the present and prepare FASFAA for the future based on our diverse membership.

Motion/ Action Item(s):

None at this time.

Policy & Procedure: Changes/ Recommendations:

None at this time.

Activity Summary:

- New/Intermediate Aid workshop held February 1-3, had 50 attendees on a budget of 30.
- Dameion Lovett was voted by the board to replace Kris Hatcher who resigned from the board as President-Elect.
- Kylie Gross was voted by the board to replace Tracy Moat who resigned from the board as Treasurer.
- Uptick in social media presence. 163 connections were created on LinkedIn. We posted all FASFAA webinars, workshops and the annual conference.
- Facebook postings were consistent throughout the year and received some “love” from NASFAA on the site.
- Annual conference: May 22-26, Fort Myers, theme: Earth’s Mightiest Heroes
 - Kicked off with the Director’s Summit hosted by SASFAA President-Elect Daniel Barkowitz, there were 65 attendees.
 - Pre-Conference – 2 NASFAA credentials were presented, 14 attendees.
 - Annual conference, we had Brad Barnett, NASFAA Chair, Michael Morgan, SASFAA President & Dana Kelly, NASFAA VP, had 233 attendees, including our business partners.
- Worked with Special Projects designees, Kristina Chavers and David Alexander on the following topics:
 - Job Descriptions for elected board positions.
 - Hope to have a draft document this month.
 - UBS alternative?

- Met with one company, due to timing did not have an opportunity to present to the Fiscal Concerns Committee.
- Bonnie Pirkle – contact Past Presidents to create a more robust info sheet to continue to build and maintain fund.
 - Was able to obtain some more pictures and information from past colleagues, adding a video to the website.



Southern Association of Student Financial Aid Administrators

David McMillion / GASFAA President 2022-2023

Executive Board Report/June 2023

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 valuable feedback and advice to the SASFAA Executive board.
- To support SASFAA initiatives on the state level

Motion/ Action Item(s):

- None

Policy & Procedure: Changes/ Recommendations:

- None

Activity Summary:

- GASFAA held its spring executive board meeting on 05/30/2023 at this board meeting we review our income and expenses and made the decision to raise our Institutional Membership rate for FY 2024
- GASFAA held its spring conference from 05/31-06/02.
 - 218 registered for the conference
 - 14 Partner Sponsors
- GASFAA 2023-2024 elected board members
 - **Kristie Teasley- President**
 - Emmilee Mitchell- President-Elect
 - David McMillion- Past President
 - Courtney Ray- VP of Professional Development
 - Audra Jimenez- Treasure
 - Casey Worley- Secretary
 - Melodie Pirone- Treasure-elect
- GASFAA transition meeting will be July 6-7 in LaGrange, GA.
- GASFAA 2024 Conference will be at the Great Wolf Lodge May 21-23, 2024



Southern Association of Student Financial Aid Administrators

Mark Messingschlager / Kentucky President

Executive Board Report/June 2023

Goals for 2022-2023:

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

Activity Summary:

President Messingschlager presided over a successful spring conference in Lexington, KY. There were 160 attendees, which is a high point in attendance in the last 10 years. General feedback was good and there seemed to be plenty of anticipation and interaction with the new FAFSA and other major changes to FSA programs over the next few years. The conference featured special guests, Dana Kelly (NASFAA), Michael Morgan (SASFAA/TASFAA), Zac Christian (SCASFAA), Heather Boutell (TASFAA), and John Hicks, State Budget Director and Executive Cabinet Secretary to the Governor.

At the spring KASFAA conference, the new website was launched, culminating a year-long effort and strategic goal. The new website is operational, and work continues to increase functionality and migrate documents from the old site, which is now archived.

The KASFAA transition meeting was held May 17-19 at General Butler State Park where the board unofficially transitioned to Michelle Standridge as President.

KASFAA was involved in the recent SASFAA NAOW with both attendees and an instructor.



Southern Association of Student Financial Aid Administrators

- Terry Bland / President for Mississippi
- Executive Board Report/Year End 2022-2023

- **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.
- Held an In-Person Board Meeting October 4-5, 2022.
- Had Fall Training November 3, 2022.
- Held a Board meeting via Zoom March 6, 2023
- Held Annual Conference April 26-28, 2023.



Southern Association of Student Financial Aid Administrators

Michelle Hemmer- North Carolina State President (NCASFAA)

Executive Board Report/June 2023

Executive Board

| Position | Name |
|-------------------------------------|--|
| President | Michelle Hemmer |
| President-Elect | Rachel Cavanaugh |
| Past-President | Zilma Lopes |
| Vice-President | Tiffany Youngblood |
| Treasurer | Tamara "Nikki" Glaspie |
| Secretary | Lee Bray |
| Budget & Finance | Sharon Oliver |
| Conference-Fall | Amanda Buchanan |
| Conference-Spring | Keats Ellis |
| Diversity/Global Issues | Ashlea Buntin |
| Intermediate Aid Officers | Lori Lewis |
| Legislative Advisory | Valerie Clem-Brown |
| Membership | Bruce Blackmon |
| New Aid Officers | Rachel Cavanaugh |
| Professional Affiliates | Shannon Jones |
| Publicity & Publications | Madison Vance |
| Site Selection | Janee Knippenberg |
| State Agency Liaison | Shawn Henderson |
| State & HS Relations | Kathy Hastings McDonald |
| Technology Task Force | Cedric Barksdale, Zilma Lopes, & Michelle Hemmer |
| Training Webinars | Vacant |
| 2 Year Public Sector | Amanda Buchanan |
| 4 Year Public Rep | Frederick Holding |
| Independent Rep | Karen King |
| Proprietary Rep | Vacant |

Goals for 2022-2023:

NCASF AA Goals:

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.

SASF AA Goals:

1. Gain an understanding of my role and the SASF AA association and operations.
2. Contribute in any capacity to the President's visions & goals and SASF AA's LRP & GAP goals.
3. Ensure that North Carolina is appropriately represented in all SASF AA 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.

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

- We are planning our 2nd Director Summit-February 28th & March 1st
- Thanks to my Budget & Finance Chair, team, we moved our last CD to investments and we are no longer in the CD business.
- Our spring virtual went well and received positive feedback.
- Continuing to work on our website and cleaning out our membership database
- Looking into inst. Membership vs individual memberships



Southern Association of Student Financial Aid Administrators

Missy Perry/ SC State President

Executive Board Report/June 2023

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:

- SCASFAA had a very successful year with extensive professional development offerings including monthly webinars, a well-attended expanded Spring New and Intermediate Aid Officer Workshop, a leadership symposium, and FAFSA Simplification Roundtable, thanks to VP Adam Ghiloni.
- Hosted a very successful conference in Myrtle Beach in October (thanks to President Morgan for his attendance and presentations).
- Increased awareness with an updated Diversity, Equity, and Inclusion Committee (previously Global Issues), with committee hosted presentations at each event.
- Completed Transition with 23-24 Board on June 8-9 in Greenville. We are looking forward to a great year under the leadership of Zach Christian.



Southern Association of Student Financial Aid Administrators

Charles Harper / TASFAA President

Executive Board Report – June 2023

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 |
| 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

Yearly State Activity & Events Summary:

TASFAA Goals for 2022-2023 included:

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

TASFAA Regional Training was held on October 19-20, October 31/November 1 and November 2-3 in East, Middle, and West Tennessee. There were 144 financial aid administrators attending one of the three sessions. The two-day training was held at Pellissippi State CC, Nashville State CC, and TN College of Applied Technology - Memphis/Bartlett campus. The agenda included a New Aid Officers training, state program training/update and Directors panel Q&A.

TASFAA annual conference was held April 16-19, 2023. Our theme was *TASFAA: Better Together*. Approximately 268 TASFAA members from 2 year, 4 year public, 4 year private, Proprietary, and TCAT institutions attended the conference. TASFAA provided a NAOW, a Mid-Level Management Workshop, 6 general sessions and 25 concurrent sessions. Special thanks to Dana Kelly, Michael Morgan, Daniel Barkowitz, Katie Conrad, and Kristie Teasley for attending, presenting, and representing NASFAA, SASFAA, FASFAA, and GASFAA.

Review and update Policy and Procedures to align with current processes and Work with TASFAA Long Range Planning Chair on new 5 yr. LRP for TASFAA.

Board members reviewed areas of the P&P to adjust and update areas that align with the current operating procedures for TASFAA. The Long Rang Planning Committee developed and submitted the new 5yr. TASFAA Long Rang Plan to be voted on during the final board meeting scheduled for June 22nd, 2023.

Continue to strengthen relationship with THEC/TSAC.

TASFAA recognizes and appreciates that collaboration between TSAC and TASFAA members is already taking place. Often, the membership is not aware of the collaborative efforts. Communication and joint efforts between

TASFAA and THEC/TSAC remained ongoing throughout the year as both TASFAA and THEC/TSAC continued to discuss and collaborate on many of the changes throughout higher education this past year as well as the changes coming for 2024-2025. TASFAA appreciates the working relationship and looks forward to keeping strong lines of communication and collaboration intact going forward.

Annual Events:

October 6-7, 2022: TASFAA Conference Committee Meeting and TASFAA Board Meeting

October/November 2022: TASFAA Fall Training Series

January 26-26, 2023: TASFAA Conference Committee Meeting and TASFAA Board Meeting

February 11, 2023: SASFAA Executive Board Meeting

February 12-15, 2023: SASFAA Conference

April 16-19, 2023: TASFAA annual Conference

June 29-July 2, 2023: NASFAA Conference



Southern Association of Student Financial Aid Administrators

Joe Dobrota / Virginia State Representative

Executive Board Report/June 2023

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 | mcnamarar@centralvirginia.edu |
| Past President | Beth Armstrong | Virginia Tech | beth1@vt.edu |
| Secretary | Dominique Maddux-Jackson | J. Sargeant Reynolds Community College | 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 Comm College | iquinn@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 | mjfranks@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:

- 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:

- Annual Conference Held May 7 – 10, 2023 in Portsmouth, VA
Pre-Conference Events: Leadership Summit, New Aid Workshop
- Approved Dates/Location for 2024 Conference:
 - Omni Charlottesville, VA April 14-17, 2024 (Submitted to both SASFAA and NASFAA web)

- Election Results:
 - President-Elect, Andrew Quinn, Brightpoint Community College
 - Treasurer-Elect, Kirsten Basham, Radford University Carilion
 - Secretary, Dominique Maddux-Jackson, Reynolds Comm College
 - Rep-at-Large (2-year Term), Rosa Thomas, Hampden-Sydney College
 - Rep-at-Large (2-year Term), Shannon Martinez, Reynolds Community College
- VASFAA Award Recipients:
 - Excellence Award, Janee Knippenburg, PNC
 - Service Award, Kathleen Roebuck, Cognition Financial
 - New Professional, Kirsten Basham, Radford University Carilion
 - Spirit Award, Hunter Parks, Radford University Carilion
- Hosted Webinar, April 18, 2023
 - **FM Verification and Conflicting Information 2023-2024 by IronBridge Resources**
- Transition Board Meeting Scheduled for June 11-13, 2023
 - Blackstone Inn, Blackstone, VA
- Board made decision to purchase cyber security insurance in response to phishing event earlier this year.



Southern Association of Student Financial Aid Administrators
Sandy Neel, Association Governance
Transition Meeting Year-end Report
June 17, 2023 Orlando, FL

Committee Members (committee chairs report members)

Sandy Neel, Caucasian, Female, Chair, Spalding University, Private
Runan Evans, African American, Female, Bluegrass Comm and Tech College, 2 yr Public
Brenda McCafferty, Caucasian, Female, ECMC, Business Partner
David Alexander, African American, Male, ECPI Private
Cindy May, Caucasian, Female, University of Mississippi, 4yr Public
Stephanie Miller, Caucasian, Female, Central Alabama Comm College, 2 yr Public

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

SASFAA LRP and GAP Goal Activity to date:

1. Talked with President-Elect Barkowitz regarding developing a new LRP that is both goal orientated and measurable at the February Annual Conference.
2. Held a meeting at the Annual Conference to discuss P&P and other items related to Governance.

3. Held an in-person meeting to complete the Board review and the AG Reports is being presented to the Board at Transition.
4. The previous year's AG report was reviewed by the Committee prior to the 2022-23 year.
5. Reviewed P&P and By-Laws and made recommendations for changes that meet current best practices, the mission and the vision of the Association was done throughout the year.

Motion/ Action Item(s):

See below for P&P change

Policy & Procedure: Changes/ Recommendations:

This is what the Association Governance Committee was trying to say at the Board Meeting for the P&P changes (see below). We already passed another part but this is the additional changes.

6.7 Association Governance

Currently 3) states:

3) The Committee will meet at least once a year to evaluate the Board's progress toward meeting goals and providing a helpful encouraging written report (referred to as the GAP Report) of the evaluation.

Change to:

3) Meeting at least once a year to evaluate the Board's progress toward achieving goals and providing a helpful encouraging written report (referred to as the GAP Report) that may include recommendations for the President and Board to assist in meeting the goals of the organization.

And Currently on 11) of that same section:

11) Establishing 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.

Change to this:

11) Establishing a committee list serve, if necessary, and provide updates and evaluations of the long-range plan on the website and other media platforms adopted and approved by the board.

Activity Summary:

The Association Governance Committee had a very successful meeting to review the Board's accomplishments. We are presenting the report and additional recommendations at the transition meeting.



Southern Association of Student Financial Aid Administrators

Brenda Brown – Partner Advisory Board Chair

Executive Board Report/June 2023

No report submitted.