

Southern Association
of Student Financial
Aid Administrators
October 2023



Agenda and
Board Reports

Prepared by Secretary Nicole Patrick

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AGENDA
SASFAA Board Meeting
October 21, 2023
Charleston, South Carolina

Saturday, October 21

	<i>Continental Breakfast</i>	<i>Lobby</i>
<i>9:30 AM</i>	<i>Board Meeting</i>	<i>Ballroom C1</i>
	Call to Order	Daniel Barkowitz
	Roll Call / Establish a Quorum	Nicole Patrick
	Welcome to South Carolina	
	Motion/Action Items	Daniel Barkowitz
<i>Action Item:</i>	<i>Minutes from September 11, 2023 meeting of the board.</i>	
<i>Action Item:</i>	<i>Membership Committee</i>	<i>Sarah Baumhoff</i>
	<i>*2223 outstanding invoices</i>	
	<i>*Renewal process and creation of new record</i>	
<i>Action Item:</i>	<i>Sponsorship Committee P&P change</i>	<i>Biz Daniel</i>
<i>Action Item:</i>	<i>Business Partner Advisory Group</i>	<i>Bill Ayers</i>
	<i>*Business Partner recruitment campaign</i>	
	<i>*Develop refer-a-partner program</i>	
	<i>*Multi-year sponsorship commitment</i>	
	<i>*Launch BP member survey</i>	
<i>Action Item:</i>	<i>Equity, Inclusion and Global Issues</i>	<i>Michael Birchett</i>
	<i>*update Diversity Statement</i>	
	Round of Successes (2-3 minutes each)	All
<i>12:00 PM</i>	<i>Lunch</i>	<i>Ballroom C1</i>
	<i>New Business</i>	<i>Daniel Barkowitz</i>
	<i>*Conference Update</i>	
	<i>*Webinar update</i>	
	<i>*Management Institute update</i>	
	<i>*Discussion of transition meeting timing</i>	
	<i>*Discussion of business partners</i>	
	<i>*Slack channel/NASFAA Partnerships</i>	
	<i>*Reviewing and approving committee members</i>	
	Old Business	Daniel Barkowitz
	Adjournment	Daniel Barkowitz



Southern Association of Student Financial Aid Administrators

Daniel T. Barkowitz / SASFAA President

Executive Board Report/October 2023

Executive Board

Board Members:

- Michael Morgan, Past President (TN)
- Leigh Ann Hussey, President-Elect (GA)
- Daniel Barkowitz, President (FL)
- Katie Conrad, Vice President (FL)
- Carolyn Sparks, Treasurer (SC)
- Nicole Patrick, Secretary (MS)
- Jenelle Handcox, Budget and Finance Chair (GA)
- Gail Beggs and Melanie Gillespie, Conference Co-Chairs (AL, SC)
- Michelle Hemmer, Communications Chair (NC)
- Michael Birchett, Equity, Inclusion and Global Issues Chair (KY)
- Jennifer Davis, Electronic Services Chair (SC)
- Rachelle Feldman, Legislative Affairs Chair (NC)
- Sarah Baumhoff, Membership Chair (GA)
- Joan Bailey, Site Selection Chair (FL)
- Elizabeth (Biz) Danuel, Sponsorship Chair (VA)
- Cierra Smith, Alabama State President
- Dameion Lovett, Florida State President
- Kristie Teasley, Georgia State President
- Michelle Standridge, Kentucky State President
- Heather Dearman, Mississippi State President
- Rachel Cavanaugh, North Carolina State President
- Zachary Christian, South Carolina State President

- Jennifer Byrd, Tennessee State President
- Ryan McNamara, Virginia State President
- Celena Tulloss, Association Governance Committee Chair (TN)
- Bill Ayers, Partner Advisory Board (FL)
- Chad Sartini, Special Projects Governing Document Review (VA)

SASFAA Goals for 2023-2024:

- Provide a fully robust training calendar for 2023-24 in preparation for FAFSA Simplification, including monthly webinars, a Fall management institute focused on FAFSA Simplification and change management, and an engaging and informative annual conference.
- Expand the numbers of new members while continuing to provide valuable services to continuing membership
- Create additional opportunities for members to engage with SASFAA
- Work to document policies and procedural changes which were approved during the COVID pandemic years and ensure that these are codified in relevant SASFAA documentation
- Bring current SASFAA leadership to Washington, DC to meet with key leaders in Congress, while also retooling and rethinking SASFAA's Legislative Affairs committee and its activities
- Conduct monthly board meetings virtually to ensure that progress on SASFAA goals continues between in person meetings
- Convene the board in October and February for our in-person meetings
- Ensure that the budget and fiscal health of SASFAA is in good standing
- Represent SASFAA as a NASFAA Regional Observer
- Prepare the President-Elect for her year of service as president

LRP and GAP Goal Activity to date:

- Organizational Structure
 - Goal 1. Annual Bylaws Review. Assigned review to Special Projects Chair
 - Goal 2. Guiding Principles Adhere to Bylaws. Reviewed bylaws at transition meeting
 - Goal 3. P&P Review. Assigned review to Special Projects Chair and added as topic to regular in-person board meetings.
- Board of Directors
 - Goal 4. Diversity of Board. Ensured representation of states, types of institutions, and all aspects of diversity. Also spent time educating each member of the board as to their goals and responsibilities.
- Committees
 - Goal 5. TO BE DONE – Call for volunteers and committee member vetting (will be completed at the October board meeting)
 - Goal 6. Creation of the Association Governance Committee has been completed. Chair Tulloss is leading the combined group.
- Membership
 - Goal 7. Increase membership. See actions below. We are well on the way to increased membership for 2023-24.
 - Goal 8. Expand the benefits of membership. See activities below. Webinar series has been a tremendous expansion of membership benefits.
- Communication
 - Goal 9. Disseminate information to membership. Communications chair has been providing regular updates to membership.
- Professional Development
 - Goal 10. Collaborative training opportunities. This year SASFAA is providing a plethora of training opportunities in preparation for the coming FAFSA Simplification. See activities below
 - Goal 11. Leadership development opportunities. SASFAA Diversity Leadership program continues in year 3. Also management institute has been expanded and allows for development of SASFAA leaders.
 - Goal 12. Financially prudent. This year is operating with a balanced budget with a minimal projected draw from assets. Conference will be an expense, but SASFAA is managing expenses to ensure long-term stability without limiting the reach of programming.

- Goal 13. Five year financial plan. Budget committee will continue to review
- Goal 14. Bookkeeper. We will be working on job descriptions between treasurer and bookkeeper and separation of duties.
- Goal 15. External review of SASFAA Finances. *No progress made as of this point.*
- Goal 16. Transition of financial leadership. No work needed; this item is complete.
- Goal 17. Educate membership on Legislative Advocacy. Under committee chair Feldman, the committee is using this year to retool and refocus its outreach and efforts under Legislative Advocacy. A plan will be developed and shared with the board and membership.
- Goal 18. Provide opportunities for Legislative Advocacy. See above
- Goal 19. SASFAA as an influencer for legislative process. See above.
- Goal 20. Provide for Congressional visits. SASFAA Leadership will make Hill visits in DC in February.

Motion/ Action Item(s):

None

Policy & Procedure: Changes/ Recommendations:

None

Activity Summary:

- Conducted outreach to prospective membership with personal invitations to each FAD, CFO and President of each institution in the SASFAA region (July).
- Built budget with the Finance Committee and had it approved by the Board in July.
- Assisted in developing and finalizing annual webinar schedule.
- Participated as a presenter in July's SASFAA webinar – FAFSA Simplification Planning and Project Management. This webinar was an open webinar to anyone who wished to attend, which led to many new members.

- Assisted in development, promotion, and outreach for Management Institute, resulting in largest Fall management institute on record. At present, we have 97 attendees in total which includes 10 business partners, 7 presenters, and 80 registered attendees.
- Worked in August with Sponsorship Chair and Partner Advisory Board Chair to publish and solicit contributions from business partners, including developing new a la carte sponsorship options, as well as a special opportunity to be part of the Management Institute.
- As new sponsors pledged support, called each sponsor to express SASFAA's appreciation.
- Attended Business Partner Advisory Board initial call (July) to express gratitude and explain the vision for the year.
- Worked with Site Coordinator chair on logistics for Management Institute and Board Meeting. Assisted in review of New Aid Officer Workshop proposals.
- Worked with Conference Chairs and VP Training for plans for conference: meals, speakers, charity, etc.
- Participated as a presenter in September's SASFAA webinar – Delayed FAFSA: Communication and Outreach Strategies
- Serving as presenter for FAAC Forum and Management Institute in October.
- Attending MASFAA (Midwest) regional meeting in October as part of the regional president swap; will be presenting several sessions at the conference.
- Convened monthly meetings of President, Past President, President-Elect, and VP Training to plan for coming activities and events.
- In July, attended NCAN event in DC to preview new FAFSA.
- Led WASFAA (western region) session in July on Pell Awarding in Simplification (webinar)
- Led RIASFAA (Rhode Island) session in September on Top 10 Issues (webinar) with VP Conrad
- Will lead IASFAA (Iowa) session in October on Pell Awarding in Simplification (virtual presentation at their conference)
- Led monthly SASFAA Board meetings (virtual)
- Participated in conversation about potential SASFAA podcast (September)



Southern Association of Student Financial Aid Administrators

Leigh Ann Hussey, President-Elect

Executive Board Report/October 2023

Committee Members

- 2025 Conference Chair - Leah Louallen
- 2024/2025 Committee Members - TBD

Committee Goals for 2023-2024:

- Support President Barkowitz and his 2023-2024 goals for SASFAA
- Begin planning for the 2024-2025 year including draft budgets, conference and other training events, theme, focus areas, and board members.
- Represent SASFAA at 3+ state conferences and various NASFAA events
- Meet with past-presidents, review past LRPs and GAP reports, review the P&P, and perform other tasks in order to prepare for the 2024-2025 year.
- Complete any tasks and projects assigned by President Barkowitz

LRP and GAP Goal Activity to date:

- Coordinated the President-Elect State Conference swap

Motion/ Action Item(s):

None

Policy & Procedure: Changes/ Recommendations:

None

Activity Summary:

- Selected the 2025 Conference Chair
- Coordinated the 23/24 state president-elect conference swap
- Co-Facilitated the July/August 2023 NASFAA FAAC virtual prep course.
- Co-Facilitating the Pre-Management Institute FAAC prep course



Southern Association of Student Financial Aid Administrators

Michael D. Morgan / Past President

Executive Board Report / October 2023

Committee Members

Charles Harper, TN
Michelle Hemmer, NC
Joe Dabrota, VA
Mark Messingschlager, KY
Nadine Bailey, FL
David McMillion, GA
Missy Perry, SC

Committee Goals for 2023-2024:

- Solicit nominations and present a full slate of candidates for the SASFAA election for the offices of SASFAA President and SASFAA Secretary following this meeting
- Present the full slate of candidates to board for approval in early December
- Solicit award nominations and present to the Board
- Finish video project commemorating the 60th anniversary to be used for future SASFAA promotions and archive.

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:

None at this time



Southern Association of Student Financial Aid Administrators

Katie Conrad/ Vice President for Training

Executive Board Report/October 2023

Committee Members

Kathy Bialk – Webinar Coordinator

Nancy Ferguson – Management Institute Coordinator

Chad Sartini – NAOW Curriculum Coordinator

Mark Messingschlager – Pre-Conference Coordinator

Carolyn Sparks, Sarah Baumhoff, Michael Birchett, Kristine Hibbard, Arlisha Walton – Conference Curriculum sub-committee.

Committee Goals for 2023-2024:

1. Offer a monthly webinar series for our membership.
 - Kathy Bialk named Webinar Coordinator.
 - Topics are selected for the year in advance.
 - Registration is open for the entire series of webinars.
2. Host a Management Institute focus on managing the changing financial aid landscape.
 - Goal of 75+ attendees, cost is \$325.
 - Nancy Ferguson named Management Institute Coordinator
 - Topics will range from transformative change management, FAFSA Simplification, and managing enrollment during times of change.
 - Registration is open and announcement went out 8/2/23.
3. Host an FAAC Exam Prep Workshop in conjunction with the Management Institute in October
 - Katie Conrad, Leigh Ann Hussey, and Celena Tulloss will facilitate.
 - Goal of 25 attendees, cost is \$200.
 - Registration is open and announcement went out 8/2/23.
4. Host an FAAC Exam Prep Workshop in conjunction with the Annual Conference in February
 - Katie Conrad and Celena Tulloss will facilitate.
 - Goal of 25 attendees, cost is \$200.
 - Registration should open in October when Annual Conference registration is open.
5. Host at least 2 Pre-Conference sessions in conjunction with the Annual Conference in February
 - Mark Messingschlager named Coordinator.

- Goal of 25+ attendees, cost is \$75 each.
 - Registration should open in October when Annual Conference registration is open.
6. Coordinate a curriculum committee for the Annual Conference to develop the session topics for all sessions.
 - Plan at least 5 general sessions with federal trainer, NASFAA trainers, and SASFAA members.
 - Plan a robust concurrent session schedule with a variety of relevant topics.
 - Work alongside our conference co-chairs for all other conference planning.
 7. Host a New Aid Officer Workshop in late spring/summer.
 - Chad Sartini will serve as NAOW Curriculum Coordinator
 - Secure at least 10 (possibly 12) NAOW Instructors with one alternate.
 - Secure 2 Business Partners for the event.
 - Select a site based on the response from the RFP.
 - Hold a NAOW Staff Retreat in March at the selected site.
 - Goal of 120 (possibly 144 if we add a 6th class) participants, cost is \$725 each.

LRP and GAP Goal Activity to date:

The SASFAA Management Institute is geared toward senior-level financial aid administrators, generally defined as AVP, director, associate director, assistant director, or other senior leadership level in the financial aid office. This meets the objectives of “Periodically offer venues to upper-level aid administrators to train, discuss and engage with peers and other high level administrators” under the Professional Development section of the LRP.

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

1. Webinars: Completed 3 of the webinars to date.
 FAFSA Simplification Planning and Project Management: 544 people registered.
 It's FISAP Time: 166 people registered.
 Delayed FAFSA: Communication and Outreach Strategies: 330 people registered.
 The first webinar was open for anyone. The rest of the series requires membership. Received great feedback after each one. The recordings are posted for members on the website.
2. Management Institute: SOLD OUT 80 participants registered, 7 presenters, and 10 Business Partners.
3. FAAC Exam Prep Workshop: 15 participants registered, 4 presenters.

4. Conference Curriculum planning: Extended invitations to Dana Kelly, Justin Draeger, Danette Burgess, Craig Slaughter, and Helen Faith for the conference. Began working with committee members to select general session topics and work through session proposals received via the survey.
5. Reviewed the proposals received for hosting the NAOW and the Board approved Converse College. Once we have a signed contract, we will announce the site and post more information on the website. The dates for the event will be June 2-7, 2024 with instructors and staff reporting on May 31st.



Southern Association of Student Financial Aid Administrators

Nicole Patrick/ Secretary

Executive Board Report / October 2023

Committee Members

Sarah Dowd

Nancy Ferguson

Committee Goals for 2023-2024:

- *Review, recommend, and update P&P as needed in a timely manner
- *Review, recommend, and update By-Laws as approved by the Executive Board in a timely manner
- *Submit reports for blog according to established schedule for the year
- *Set up rules of engagement, confidentiality agreement, and conflict of interest forms for electronic submission

SASFAA LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

N/A



Southern Association of Student Financial Aid Administrators

Carolyn Sparks/ Treasurer

Executive Board Report / October 2023

Committee Members

Committee Goals for 2023-2024: As stated from SASFAA Policies and Procedures:

The Treasurer is elected for a two-year term and oversees and manages the Association's financial matters. Additional responsibilities include:

- (1) submits financial reports to the Board at each meeting and the annual business meeting;
- (2) prepares annual year-end financial statements as of June 30;
- (3) arranges, in coordination with the budget and finance chair, for an annual independent financial review of the financial records;
- (4) files IRS form 990 for the fiscal year by the prescribed deadline, currently November 15 and all financial reports in a proper and timely manner;
- (5) sets up master accounts and obtains credit for the Association as appropriate;
- (6) performs other duties as requested by the President; and
- (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;
- (8) serve as the conduit for the Bookkeeper and the SASFAA Board of Directors;
- (9) in the absence of a Bookkeeper, the Treasurer is responsible for performing all of the duties assigned to that position;
- (10) monitors SASFAA investments and contractual obligations.

Personal goals as Treasurer:

- Respond to reimbursement requests within five business days.

- Submit board reports in a timely fashion.
- Assist the Bookkeeper with processing and responsibilities during peak times.
- Submit a clean financial review for the 2023-24 year.

LRP and GAP Goal Activity to date:

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

- I signed and submitted the necessary documentation in order to have access to our Edward Jones account information.
- I met with Jeff Dennis several times over the summer to have access to SASFAA bank accounts and QuickBooks.
- I signed a revised resolution (along with Daniel Barkowitz) with Truist so we could acquire SASFAA credit cards for appropriate officers and/or committee chairs.
- I have submitted all requests for reimbursement to Jeff Dennis. Jeff, in turn, has processed all of those to date.
- Attended conference committee meetings via Zoom.



Southern Association of Student Financial Aid Administrators

Jenelle Handcox / Budget and Finance Chair

Executive Board Report / October 2023

Committee Members

- Committee Members
 - TBD

Committee Goals for 2023-2024:

- Assist President in preparing and monitoring zero-based budget
- Assist President and Treasurer with financial oversight
- Continue to 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
- Review GFM and P&P for clarifications and/or inconsistencies

LRP and GAP Goal Activity to date:

- Initial 2324 operating budget approved
- 2324 operating budget posted to website

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

Operating Funds (15-25% target) – Bank Accounts	\$ 214,503.35	Currently 20%
Short Term (30-45% target) – Advisory Solutions	\$ 468,591.57	Currently 43%
Long Term (30-45% target) – Charles Schwab	\$ 411,160.15	Currently 37%

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)	\$ 1,094,255.07
Prior Year Ending Budget	\$ 394,000
Outstanding Contractual Agreements	\$ 353,894
Balance	\$ 346,361
20% maximum transfer from assets	\$ 69,272

Motion/Action Item(s):

- None to report

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.

Outstanding Contractual Obligations:

- **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**
- **Converse College**, NAOW, 8/31/2024 – 6/7/2024
 - Contract pending
 - **Hyatt Regency Greenville**, Annual Conference, 2/14/2025 – 2/19/2025
 - Contract pending

Balance Sheet:

- The Balance Sheet as of October 2, 2023 is provided below:

Southern Association of Student Financial Aid Administrators

Balance Sheet

As of June 30, 2024

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	
2 BB&T Checking-ACH Only	100.00
BB&T Checking	163,583.99
BB&T Savings	47,922.78
Edward Jones-Money Market	2,896.58
Total Bank Accounts	\$214,503.35
Accounts Receivable	
Accounts Receivable	0.00
Total Accounts Receivable	\$0.00
Other Current Assets	
6 Prepaid Expenses	0.00
Advisory Solutions 20/80 @ Edward Jones	468,591.57
Charles Schwab (NASFAA)	411,160.15
Undeposited Funds	0.00
Total Other Current Assets	\$879,751.72
Total Current Assets	\$1,094,255.07
TOTAL ASSETS	\$1,094,255.07
LIABILITIES AND EQUITY	
Liabilities	
Total Liabilities	
Equity	
Opening Balance Equity	757,980.87
Retained Earnings	241,982.79
Net Income	94,291.41
Total Equity	\$1,094,255.07
TOTAL LIABILITIES AND EQUITY	\$1,094,255.07

Cash Basis Monday, October 2, 2023 08:24 AM GMT-04:00



Southern Association of Student Financial Aid Administrators
Gail Muse Beggs and Melanie Gillespie – Conference Committee Chair
Executive Board Report/October 2023

Committee Members - Melanie Gillespie and Gail Beggs, Co-Chairs

Biz Daniel	Carolyn Sparks	Kaitlyn Lambert	Amanda Buchanan
Katie Conrad	Sarah Baumhoff	Audrey White	Renee Green
Jennifer Davis	Michael Birchett	Kristine Hibbard	Arlisha Walton
Joan Bailey	Dameion Lovett	Jessica Alston	Katie Stroup
Daniel Barkowitz			

Committee Goals for 2023-2024:

- Plan and organize the 2024 SASFAA Conference.
- Ensure all committee members are plugged in and working within their strengths.
- Host meaningful and productive monthly planning meetings to ensure we are on track.

LRP and GAP Goal Activity to date:

- None

Motion/ Action Item(s):

- None

Policy & Procedure: Changes/ Recommendations:

- We do not have any at this time.

Activity Summary:

- Melanie and Gail met in June and set the dates for future meetings, as well as established a committee representative of the entire region. We intentionally did not meet in August.
- July 13, 2023 – first Conference Committee Meeting
- September 14, 2023 – second Conference Committee Meeting
- Future Dates are as follows and may or may not require the full Committee to the present
 - October 12, 2023
 - November 16, 2023
 - December 14, 2023
 - January 11, 2024
 - February 15, 2024 – it's Go Time



Southern Association of Student Financial Aid Administrators

Biz Daniel / Sponsorship Chair

Executive Board Report/October 2023

Committee Members:

Bill Ayers – College Ave
Janee Knippenberg – PNC
Melanie Gillespie – Tri-County Technical College
Katie Conrad – Florida International University

Committee Goals for 2023-2024:

In collaboration with the Special Projects Chair (Business Partner Liaison) the Sponsorship Committee's goal is to promote SASFAA, its mission and activities in such a manner that companies who operate within the financial aid and higher education space will want to invest in and support SASFAA in reaching its goal of providing the superior level of webinars, workshops, and training events that the membership has become accustomed to receiving.

To following objectives are how we intend to support the committee's goal:

- Increase the opportunities and visibility of sponsors who support SASFAA supporting the ROI of these companies who invest in SASFAA's success.
- Increase opportunities for Sponsors to invest dollars in support of the training initiatives of the Association.
- Increase awareness and value of sponsor involvement in the Association through public acknowledgement, and support of this sector's participation.

LRP and GAP Goal Activity to date:

- Reached out to potential Committee members, secured responses regarding volunteering for work on the committee.
- Updated/Edited the menu of Sponsorship Opportunities; collaborated with the Special Projects Chair and Conference Chair to confirm conference options.
- Presented options to the conference committee and received verbal approval to present to the Board for approval and distribution to Business Partners.

Motion/ Action Item(s):

None

9/11/23 – SASFAA Board Virtual Meeting the list of revised sponsorship levels and a-la-carte options for sponsorship were presented to the Board and approved.

Policy & Procedure: Changes/ Recommendations:

The P&P references the name of the committee as the Sponsorship Committee however, the name ‘sponsor’ is not consistent throughout the P&P. The word ‘Sponsor’ and ‘Business Partner’ are used throughout.

Examples:

6.16 Business Partner (2nd paragraph/line)

All sponsored activities must be coordinated through the **Business Partner** Chair.

6.16.2 (b)

All s Business Partners activities must be conducted through the **Sponsorship** Chair.

6.16.1 Sponsorship of SASFAA Conference

First Paragraph - Prospective **Business Partners** must agree to the rules...

Second Paragraph - **Sponsors** must agree to abide by the following rules...

Recommendation:

To be consistent, use the term “Business Partner” for all references to our financial supporters of SASFAA.

Activity Summary:

August 2023:

- Collected contact names and email addresses of perspective vendors using the list provided from the previous chair and the list of vendors who attended the annual NASFAA Conference.
- Drafted the Invitation Letter that would be sent to perspective sponsors.
- Worked with the Special Projects Chair and their committee to review and revise the previous year’s levels of sponsorship and a-la-carte options drafting a version to propose to the board for this year’s offerings.
- Worked with the Electronic Services Chair on the Sponsorship Landing Page, listing of Sponsorship Options, and Registration link for Sponsorship with the goal to ‘go live’ the first week in September.

9/7/23 - Invitation letter sent to prospective Sponsors.

The Southern Association of Student Financial Aid Administrators (SASFAA) is a regional organization of individuals from our nine member states that provide an avenue for a support and resource network offering professional training opportunities that enable and enhance the ethical and effective delivery of educational resources to the students and constituents we serve. SASFAA consists of over 750 unique higher education institutions and has over 1,300 active members who serve the financial aid community.

Each year, SASFAA dedicates itself to developing, promoting, and delivering top-notch training webinars, workshops, and an annual conference. These invaluable opportunities aim to empower financial aid professionals with the knowledge and skills needed to navigate the ever-evolving landscape of federal aid administration. However, the realization of these exceptional events heavily relies on the unwavering partnership and support of our esteemed Sponsors.

Every year, our incredible sponsors have shown immense support to the Association, and we are once again reaching out to ask for your valuable support. Our goal this year is to raise \$112,500, which will enable us to provide extensive training necessary to successfully implement and navigate the upcoming changes in the financial aid landscape.

SASFAA deeply appreciates your support and partnership, as it enables us to achieve our training goals as an association. This year, we have meticulously designed a sponsorship program with different levels, each offering unique benefits. Additionally, we have included a range of A-La-Carte items that we believe you will find valuable, further encouraging your support of SASFAA this year.

Please take a moment to review our 2023-2024 sponsorship offerings [HERE](#) or by visiting the SASFAA Website Sponsorship Page on the SASFAA Website at www.sasfaa.org .
You will find:

- A comparison chart of the Tiered Sponsorship Levels
- A detailed list with descriptions of each Tiered Sponsorship Level
- An A-La-Carte list with **NEW** items needing support.

DO NOT DELAY viewing these opportunities!!! Many A-La- Carte options are on a **first-come first-serve basis with limited space** starting as early as October!

Early Bonus... those who [register and pay](#) on or before **December 31st** will be featured in a highlighted email blast to SASFAA members that will begin 2-weeks prior to the conference (we will work with you to secure the information that will be sent). **Don't delay, commit today!**

Thank you in advance for your support of SASFAA and our mission where

Together, We Make Dreams Come True!

Thank you in advance for your commitment to SASFAA!
2023-2024 SASFAA Sponsorship Chair

September 2023:

- The financial goal for Sponsorship was set at \$112,500.
- Sponsorship Levels and A-La-Carte Options were approved by the Board via E-Meeting
- Funds raised as of 9/29/23 = \$69,800 / **(\$42,700)**

- Secured 10 Exhibitors for the Management Institute: (\$8,500)
 - Earnest, Inceptia, College Ave, Ascendium, ScholarNet, Monogram, ELM, PNC, Kennedy & Co, Next Gen
- Secured Sponsorship of the following items:
 - Neck Wallets/Name Badges for: (\$1500)
 - Management Institute - Earnest
 - New Aid Officers Workshop – Earnest
 - President’s Reception – KHEAA (\$1000)
 - Secured Sponsorship for Awards Lunch – Sallie Mae (\$1500)
 - Secured Sponsorship for Business Office – College Ave (\$500)

2023-2024 Sponsorship Levels Approved by the Board are as follows:

SASFAA SPONSORSHIP OPPORTUNITIES

BENEFITS	LEADERSHIP LEVEL \$5,000	ADVOCACY LEVEL \$3,500	SUPPORT LEVEL \$2,000
Exhibit Booth Space (1 Table) Priority Placement by Response Date	✓	✓	✓
Complimentary Conference Registration Leadership - 2 Advocacy - 2 Support - 1	✓	✓	✓
Organizational Logo on Conference Information Page	✓	✓	✓
Inclusion in Product Services Directory	✓	✓	✓
Online and In person conference support	✓	✓	✓
List of Registrants 2 Weeks Prior to Annual Conference	✓	✓	✓
SASFAA Conference Meal Card Support	✓	✓	✓
Admission to SASFAA's Director's Forum	✓	✓	✓
Webinar Series Moderator	✓	✓	
Web Banner Ad on SASFAA Website	✓	✓	
Ad in Annual Conference Electronic Program Leadership - Full Page Advocacy - 1/2 Page	✓	✓	
Ad in New Aid Officer's Workshop Program Leadership - Full Page Advocacy - 1/2 Page	✓	✓	
Business Partner Session at the Annual Conference	✓		
Recognition at SASFAA Workshops, Webinars, Training Events	✓		
General Session Moderator at Annual Conference	✓		
Ad in Director's Forum Program	✓		

2023-24 A-La-Carte Options:

A-La-Carte Sponsorship Opportunities



New Options Available

Workshop Opportunities

Management Institute - October 9-20, 2023, Charleston, SC


A two-day event geared towards senior-level financial aid administrators, generally defined as AVP, director, associate director, assistant director, or other senior leadership level in the financial aid office. There are 75 slots for attendees. The event starts at 9am on 10/19/23 and ends at 3:00pm on 10/20/23.



Exhibit Opportunity – Only 10 Exhibit Spaces Available! \$850


Open to first 10 commitments – time and date stamped responses.

- Sponsor Must be a SASFAA Member
- Includes **1** Event Registration Fee and **1** table for booth display.
 - Each additional attendee must pay the event registration fee.
- Ability to showcase your company and the services you provide to workshop attendees in a 5-minute presentation during a general session.
- Dinner Group Leader – Workshop attendees will be given the opportunity to sign-up to go to dinner at one of 10 restaurants. Each group will have a dedicated sponsor who will guide them to and from the restaurant, giving you the chance to network with leaders in the financial aid community. Special note - each person in the group will be responsible for their own meal and transportation to and from the restaurant.


 Name Badge Sponsorship \$300

- Sponsor's Logo or Company Name will be displayed prominently on all attendee's name badges.


New Aid Officer's Workshop

 NAOW Shirt Sponsorship \$2000


- Includes the SASFAA Instructor's collared 3-Button Shirts with Sponsor logo added to the sleeve of the shirt.
- Includes the SASFAA NAOW Attendee T-shirts with Sponsor logo added to the sleeve of the shirt.

 NAOW Name Badge Sponsorship \$500

- Sponsor's Logo will be prominently displayed on all attendee name badge.

 NAOW Material's Package \$500

- **5 Spots Available** for Sponsorship based on time and date stamp of completed form.
 - The Materials Package will prominently display the Sponsor's Logo





 NAOW Snack Package \$500

- **5 spots are available** – one afternoon snack break per day (\$500 each day)
 - Order of sponsorship per day will be determined by the time and date stamp the completed form in received.
- Signage will publicly display the Sponsor's name and logo name and logo for each day.

Annual Conference Opportunities

Conference App \$800

Sponsor will receive public recognition and branding recognition of the SASFAA App used prior to and during the SASFAA Conference.

 <u>Business Partner Office</u>	\$500
<ul style="list-style-type: none"> • Space is open for the first 6 commitments. • Sponsor will have a designated meeting room and 2-hour time slot for use of that room at the conference to provide product demonstrations. 	
<u>President's Welcome Reception</u>	\$1500
<ul style="list-style-type: none"> • Sponsor must be a conference exhibitor. • Sponsor will be publicly recognized with signage and special recognition. • Space is open to the first 4 commitments. Those wishing to purchase this opportunity will be honored in order of the date the web-based sponsor form is completed. 	
 <u>Conference Breakfast Bag Sponsorship</u>	\$1000
<ul style="list-style-type: none"> • Sponsors must be a conference exhibitor. • Open to the first 2 commitments. • Sponsor's Logo will be displayed on the Breakfast Bag. • Sponsor will be publicly recognized with signage and special recognition. 	
<u>Conference Lunch / Award Ceremony</u>	\$1000
Sponsor must be a conference exhibitor.	
<ul style="list-style-type: none"> • Sponsor will be publicly recognized with signage and special recognition. • Space is open to the first 4 commitments. Those wishing to purchase this opportunity will be honored in order of the date the web-based sponsor form is completed. 	
 <u>Conference Charity Event 5K Walk/Run</u>	\$1000
<ul style="list-style-type: none"> • Sponsor does not have to be a conference exhibitor. • Open to the first 2 commitments. Those wishing to purchase this opportunity will be honored in order of the date the web-based sponsor form is completed. • Sponsor Logo(s) will be printed on event T-Shirts. • Signage of support will be prominently displayed during the event. 	
 <u>Conference Charity Exercise App</u>	\$500
<ul style="list-style-type: none"> • Sponsor does not have to be a conference exhibitor. • Sponsor will receive public recognition and branding recognition of the App used to track participants steps through-out the conference. 	
<u>Advertising Combo Package</u>	\$600
<ul style="list-style-type: none"> • Sponsor does not need to be a conference Exhibitor. • Web Banner Ad on SASFAA Website • Sponsor receives a ½ page Ad in the Conference Program and a ½ page Ad in NAOW program. 	



Southern Association of Student Financial Aid Administrators
Michelle Hemmer / Communications and Outreach Committee Chair
Executive Board Report / October 2023

Committee Members

N/A

Committee Goals for 2023-2024:

1. Determine & implement a two-way communication for SASFAA members to bounce things off one another.
2. Consistently get out job postings; Tuesdays & Thursdays will be my days for these.
3. Create monthly items to send to NASFAA for SASFAA recognition in the NASFAA Newsletter.
4. Boost social media presence via Facebook.
5. Ask State Presidents to provide things they would like SASFAA to know about what is going on; What are they doing well, maybe call this a Kudos moment? Thoughts? Send out via listserv.

LRP and GAP Goal Activity to date:

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

- Keeping SASFAA informed of upcoming events and training.
- Sending out opened positions
- Posting items on Facebook.
- Working through the logistics of what a Podcast could look like.



Southern Association of Student Financial Aid Administrators

Jennifer Davis/ Electronic Services

Executive Board Report / October 2023

Committee Members

Kaitlyn Lambert - Laurel Ridge Community College

Committee Goals for 2023-2024:

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

LRP and GAP Goal Activity to date:

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

Motion/ Action Item(s):

None

Policy & Procedure: Changes/ Recommendations:

None

Activity Summary:

- Updated Executive Board page to the 23/24 members
- Created event registration and zoom meetings for all scheduled webinars
- Posted recordings, presentations, and accompanying documents to the website after each webinar
- Created Sponsorship page and registration
- Created 2024 SASFAA Conference registration page

- Updated the Diversity Leadership Program page to the 23/24 class
- Updated other areas of the website as requested



Southern Association of Student Financial Aid Administrators

Rachelle Feldman / Legislative Relations Committee

Executive Board Report / October 2023

Committee Members

Joey Derric
Katie Harrison
Adam Ghiloni
Greg Windham
James Chiara
Stephanie Miller
Egan Hanson
Amy Berrier-
Gerber
Ron Gambill

Committee Goals for 2023-2024:

Review the following questions and make recommendations to the SASFAA Board:

- What do states need from SASFAA in this area
- What do SASFAA members need to know about legislation and regulation
- What practical things can members at different levels get from this group
- If and when is it appropriate for SASFAA to take a position on legislation or issues
- What does SASFAA/leadership get from hill visits or visibility on issues like comments on legislation, negotiated rulemaking etc.

Visit the hill with key members of the SASFAA board and committee in Spring 2024

LRP and GAP Goal Activity to date:

The committee met on September 29 to gather ideas about the questions above. They will take these ideas back to their states to prioritize and we will split into teams to address the questions and work on creating a repository of materials that will serve membership and help keep them informed and interested.

Motion/ Action Item(s):

None

Policy & Procedure: Changes/ Recommendations:

None Yet

Activity Summary:

The committee met on September 29 to gather ideas about the questions above. They will take these ideas back to their states to prioritize and we will split into teams to address the questions and work on creating a repository of materials that will serve membership and help keep them informed and interested.



Southern Association of Student Financial Aid Administrators

Sarah Baumhoff/ Membership Chair

Executive Board Report / October 2023

Committee Members:

Committee Goals for 2023-2024: Continue to maintain the Membership database; 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):

How should we handle outstanding membership invoices from 2022-2023 that were never paid?

Discuss the renewal process and when an individual doesn't renew their membership and creates a new record?

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

Activity Summary:

Monitoring membership numbers and working with SASFAA Bookkeeper to adjust accounts as needed.

Participating in Conference Committee Meetings and planning for name tags and needed items once registration opens.

Contacting individuals about membership as questions are received.



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

Committee Members

- Felicia Ailster – 2yr public - GA
- Stephanie Miller – 2yr public – AL
- Irma Molinares – Business partner – FL
- Melissa Smith – 4yr Private -- TN
- Amanda Livingston - 4yr Public- FL

Committee Goals for 2023-2024:

- 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.
- Conduct site visits as necessary.
- Negotiate/renegotiate and secure contracts for locations to host SASFAA meetings and events. These include but isn't limited to:
 - Fall training event - 2024
 - Conference Committee Meeting
 - Annual conference -2026
 - Board meetings 2023-2024
 - Transition meeting 2024 & 2025
 - NAOW - 2024

SASFAA LRP and GAP Goal Activity to date:

- Finalize and close out affairs with 2023 conference and transition site

- Secured proposal and facilitate the execution of the contract for fall training management institute - to be held in conjunction with board meeting
- Secured and finalized room reservations for fall training/board meeting
- Coordinated all the activities necessary for hosting the October meetings and training events at the Embassy Suites by Hilton Charleston Airport Hotel & Convention Center
- Continuous coordination of all activities required to facilitate the annual conference as the primary contact for the site
- Secured proposal and facilitate the execution of the contract for NAOW 2024
- Solicited proposals for 2024 transition Meeting

Motion/ Action Item(s):

None

Policy & Procedure: Changes/ Recommendations: NONE

Activity Summary:

See goals to date for activities summary.



Southern Association of Student Financial Aid Administrators

Michael Birchett/Equity, Inclusion and Global Issues

Executive Board Report/October 2023

Committee Members

Melissa Todd
John Michael Schott
Kala Hudson
Eric Farmer
Brenda Ilojirole
Holly Gilliam
Natasa Novicevic
Tarik Boyd

Committee Goals for 2023-2024:

These are still in development.

LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

Update the Diversity Statement to include the addition in bold:

*As part of its mission, SASFAA seeks, accepts, and practices the inclusion and involvement of all members in all association activities regardless of age, race, ethnicity, gender, religion, **ancestry**, sexual orientation, disability, appearance, professional level, institutional type, or other uniquely defined characteristics.*

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

The 2023-2024 Diversity Leadership Program class was informed that they had been selected in July. Dominique Maddux-Jackson, Jonathan Ibarra, Shawndelea Hudson were the selectees. Photos and bios were solicited in late July. Mentors were recruited from late July to late August. Jenelle Handcox, Michael Morgan, and Nadine Bailey all graciously agreed to serve as mentors for the new class. The introductory kickoff meeting was held on September 19 and class photos and bios were added to the website that same day via Jennifer Davis. Mentors are scheduling meetings with their mentees and assisting with goals and committee assignments. An email introducing the team to the Association is slated for delivery during the 2nd week of October.



Southern Association of Student Financial Aid Administrators

Cierra Smith, Alabama State President

Executive Board Report/October 2023

Executive Board

2023-2024 AASFAA Executive Board

- Vice President: Jamie Burt, the University of Alabama
- Past President: Stephanie Miller, Central Alabama Community College
- President-Elect: Audrey White, University of Alabama in Birmingham resigned due to moving to North Carolina for job opportunity. Special election held and new President-Elect is Taylor Hilyer, Alabama Community College System
- Secretary: Ashley Martin, University of Alabama in Huntsville
- Treasurer: Gail Muse Beggs, Costal Alabama Community College
- Treasurer-Elect: Vicki Johnson, Costal Alabama Community College

Goals for 2023-2024:

- ❖ Create an AASFAA calendar for 2023-24 and start the process for 2024-25.
- ❖ Review and update all AASFAA's governing documents.
- ❖ Build membership with a focus on the 4-year institutions.
- ❖ Apply for tax exempt status.

Motion/ Action Item(s):

- ❖ None at this time.

Policy & Procedure: Changes/ Recommendations:

- ❖ None at this time.

Activity Summary:

- ❖ AASFAA has an active 2023-24 calendar with set fall conference and spring workshop dates. Virtual webinars will be added as final confirmations are made.

- ❖ AASFAA's Bylaws and Policy & Procedure Committees are diligently working on getting both documents updated with current practices and providing suggestions for new practices.
- ❖ AASFAA's Membership Committee is working on ideas of increasing membership such as membership testimonials and reach out campaigns. Specifically in the 4-year sector they recruiting with a personal touch of word of mouth.
- ❖ Tax exempt status paper work has been submitted, waiting for response.



Southern Association of Student Financial Aid Administrators

Dameion Lovett, FASFAA President

Executive Board Report/October 2023

Committee Members (FASFAA Executive Board Members)

- President-Elect/Nominations, Kamia Mwango, Santa Fe College (V)
- Past President/Fiscal Concerns, Nadine Bailey, Ultimate Medical Academy (V)
- Vice-President of Training, Jessica Ly, Florida International University (V)
- Secretary, Susan Ambridge, Valencia College (V)
- Treasurer, Arminta Johnson, Lake-Sumter State College (V)
- Treasurer-Elect, Chrissy Gass, Florida Atlantic University (V)
- Region I Representative, Angelica Coonts, Pensacola State College (V)
- Region II Representative, Alisha Hunt, Santa Fe College (V)
- Region III Representative, Karissa Lawson, University of Central Florida (V)
- Region IV Representative, Jerry McMahon, Keiser University (V)
- Region V Representative, Joseph Gonzales, University of Miami (V)
- Conference Chair, Joan Bailey, University of South Florida-Health (V)
- Vendor/Sponsorship Chair, Becky Davis, Ascendium Education (V)
- Site Selection Chair, Irma Molinares, ECMC (V)
- Federal/State Legislative Chair, Egan Hanson (V)
- Global Issues Chair, Brenda Ilojirole, Valencia College (V)
- Co-Site Selection, Laura Dickerson, Sallie Mae
- Conference Co-Chair, Christina Acosta-Heritage, Southeastern University
- Electronic Services, Eddie Schworn
- Early Awareness/Outreach/Financial Literacy Chair, Ilia Cordero, Valencia College
- Graduate/Professional Chair, Melissa Toohey, University of South Florida-Health
- Vocational/Technical/Click Hour Chair, Jeanne Shurman, Hillsborough Community College
- Florida Office of Student Financial Aid Liaison, Shawn Haskins, Florida Dept. of Education
- Bookkeeper, Gwyn Francis, FASFAA

Committee Goals for 2023-2024 (FASFAA Executive Board):

1. Increase FASFAA's participation in supporting the Florida College Access Network to help high school students successfully complete the FAFSA. In order to successfully complete this task, FASFAA will

provide financial aid training for high school guidance counselors to assist in their preparation of college bound seniors in the financial aid process.

- a. Promote FAFSA awareness throughout the state by partnering with the Florida Office of Student Financial Assistance, the Florida College Access Network and Florida Shines (Florida Virtual College)
 - b. Partner with the above and high school districts across the state to promote FAFSA completion in spring 2024
2. Increase membership and facilitate the participation of members as volunteers
3. Continue promotion of the pipeline of members who can serve on committees to help further the completion of goals throughout the year

LRP and GAP Goal Activity to date: N/A

Motion/ Action Item(s): N/A

Policy & Procedure: Changes/ Recommendations: N/A

Activity Summary:

- Held transition meeting on July 19-20
- During the month of July, I met with each board member and committee to review goals and expectations for 2023-24
- Prepared operating budget proposals for this year to be approved by the board
- FY24 operating budget approved 9/6/23



Southern Association of Student Financial Aid Administrators

Kristie Teasley / Georgia President

Executive Board Report/October 2023

Board Position	First	Last	Institution
President	Kristie	Teasley	Kennesaw State
Past President	David	McMillion	GSFC
President Elect	Emmilee	Mitchell	Mercer
Partner/Sponsorship Chair	Wanda	Pickens	UGA
Treasurer	Audra	Jimenez	North Georgia Tech
Budget Finance Chair	Pennie	Strong	GSFC
Leadership and Mentorship	Angela	Tate	TCSG
Electronic Training	Maria	Hammett	Mercer
Technology Chair	Joe	Buchholz	Ellucian
Program Chair	Aria	Simmons	
Treasurer Elect	Melodie	Pirone	Southern Crescent Tech
Legislative Affairs	James	Chiara	TCSG
Diversity, Equity & Inclusion	Tarik	Boyd	Chattahoochee Tech
Membership/Newsletter	Carrie	Wilder	Albany State
Secretary	Casey	Worley	Chattahoochee Tech
VP of Professional Development	Courtney	Ray	Lanier Tech

Goals for 2023-2024:

- Support the Goals of SASFAA through GASFAA and increase SASFAA Membership in Georgia
- Work with specific Chairs to:
 - Increase membership for GASFAA
 - Increase event participation for GASFAA
 - Increase partner participation for GASFAA
- Provide training opportunities that will inspire all levels of financial aid officers to participate in GASFAA training events in addition to the Annual Conference
- Develop the leadership on the current GASFAA Board to build future leaders within GASFAA

- To foster leadership development within our current GASFAA Board in an effort to cultivate future leaders inside our GASFAA organization

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

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

Activity Summary:

GASFAA Transition Meeting was held on July 6-7, 2023 at Great Wolf Lodge Lagrange, GA which is our site for the 2024 Annual Conference. Conference will take place on May 21-23, 2024

GASFAA Virtual Webinar Series began September 6, 2023 with the first one titled “Leveraging AI in the Age of FAFSA Simplification” with over 130 attendees. Complete Webinar series on the GASFAA website

GASFAA Fall Board Meeting was held October 3, 2023 Macon University, Macon, Georgia

GASFAA Fall workshop was held October 4 & 5, 2023 at Middle Georgia Technical College, Macon, Georgia

Major updates to our website

Nominated GASFAA Members to serve the following committees:

- SASFAA-Legislative Committee
- SASFAA-Equity, Inclusion and Global Issues Committee
- Conference Committee
- NASFAA- State Advocacy Network



Southern Association of Student Financial Aid Administrators

Michelle Standridge/ Kentucky President

Executive Board Report / October 2023

Executive Board

President	Michelle Standridge
President Elect	Robyn Sollberger
Past President	Mark Messingschlager
Vice President	Amy Smith
Secretary	Lindsay Driskell
Treasurer	Michael Birchett
Four Year Public	Beth Mekus
Four Year Private	Audrey Price
Two Year Public	Christina Bowen
Proprietary	Hazel Baker
Non-school	Chansone Durden
Archivist	Laura Keown
Articles and Bylaws	Lindsay Driskell
Association Governance and Planning	Rhonda Bryant
Awards	vacant
Budget and Finance	Daniel Donner
Communications	Danielle Robbins
Conference (Fall)	Dawn Graviss
ConferenceChair(Spring)	Casi Benedict
ConferenceChair(Spring)	Cathy Hart
Diversity Concerns	vacant
Electronic Services	Sarah Cowan
Government Relations	Kevin Lamb
Membership	Bob Fultz
Nominations	Mark Messingschlager
Outreach	Casi Benedict
Site Selection	Chester Priest
Technology	Beth Mitchell
Vendor/Sponsor Chair	April Tretter
Vendor/Sponsor Chair	Matt Lehmann
Website	Jason Tretter

Goals for 2023-2024:

- Examine the P&P in its current state and work to get it updated to be reflective of current practices and to put processes in place to ensure that it changes that are voted on are promptly made and the most up to date version is on the website for membership.
- Work on the development of the Guide for KASFAA board handbook to ensure that all Board members are educated and prepared to serve their role. **LRP**
- Work with Chairs on written job descriptions for each board member/committee chair and have one location for documents to be housed. **LRP**
- Develop letter template to reach out to campus leadership targets to specific outcomes such as conference attendance. **LRP**
- Explore cost effective ideas to reduce expenses to ensure financial viability in times of inflation.

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

President Standridge spent time with Budget/Finance committee on July 14th exploring options on how to balance the budget knowing that costs for conference continue to increase post-COVID. One idea is to move away from Board/Program meetings being held at the conference hotel for the July and December meetings. Since no December or Spring contract has been signed, Standridge will plan December meeting this way to see if it should be set into practice while considering future contracts. President Standridge, along with Site Selection Chair Priest and Treasurer Birchett had a site visit to Embassy Suites on Newtown Pike in Lexington to explore that as an option for Spring 2024 conference. Negotiations are still in work.

The KASFAA Program meeting was held July 20th, led by Fall Program Chair Dawn Graviss to prepare for the fall 2023 conference in Louisville at the Holiday Inn East on Oct. 25th -27th.

President Standridge reached out to Diana Barber, Interim Executive Director of KHEAA/KHESLC to follow up on sponsorship of the website from 22-23 and to ask the intent for 23-24. Standridge also requested that they have a general session at the Fall conference to update on what any research they have done shows will be the impact on state grants so that schools can Barber stated that support to KASFAA is an extremely important issue and that she will be working with their internal team for response.

President Standridge's focus for the 23-24 year will be to continue to grow to sense of community and support post-COVID for all membership but to also work on updating the entire P&P and begin work on the Guide for KASFAA Board to be reflective of current best practices through the efforts of a task force that will be led by Sandy Neel.

President Standridge held an e-meeting on August 9 with the Executive Board to fill the vacancy left in the VP of Training position when current VP of Training, Stephany Blaney accepted a job outside of Kentucky Financial Aid. The Board approved Amy Smith as VP of Training to finish out the remaining year of the 2-year term. The board

also approved moving funds from the current checking account to a CD to accrue more interest in a short-term investment.

President Standridge is actively working on back filling the Awards and Diversity Concerns committee chair positions left vacant due to resignation of Monique Shaw.

KASFAA outreach worked with KHEAA, the state grant agency to present a webinar to the annual training pass holders on FAFSA Simplification and the information that was presented at NCAN training in Washington D.C. earlier this fall.

KASFAA communication chair worked with Kentucky Education Television (KET) to have a panel film the annual FAFSA/Financial Aid call in show on September 27th where President Standridge, VP of Training Amy Smith, Bob Fultz and Keith Ritchie represented KASFAA to talk about FAFSA Simplification.



Southern Association of Student Financial Aid Administrators

Heather Dearman / Mississippi President

Executive Board Report/October 2023

Executive Board

Goals for 2023-2024:

Increase the number of institutions that are a part of MASFAA

- Coordinate more outreach to institutions that aren't currently involved

Communicate more frequently with the membership

Provide more training opportunities

Host regional watch parties for FSA training webinars/conference

Encourage the state aid office to include MASFAA/Fin Aid Administrators in the continuing conversations regarding state aid changes

Motion/ Action Item(s):

None

Policy & Procedure: Changes/ Recommendations:

None

Activity Summary:

Monthly MASFAA board meetings have been held

Changed to sponsorship levels to include Fall Training opportunity

Fall Training will take place November 2 at Holmes Community College Ridgeland Campus



Southern Association of Student Financial Aid Administrators

Rachel Cavanaugh /North Carolina President

Executive Board Report/October 2023

Executive Board

Goals for 2023-2024:

Hold a wonderful virtual fall conference November 6-7, 2023
Increase membership
Get more new people involved with volunteering
Hold and increase attendee numbers for 2024 spring face to face conference April 8-10, 2024
Great numbers for spring Intermediate Aid Office workshop
Increase attendee number for Director's Summit at spring conference
Increase donations for charity, Gilbert Scholarship
Monthly webinars for members
Train new members of the board for their upcoming roles

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:



Southern Association of Student Financial Aid Administrators

Zachary Christian / South Carolina President

Executive Board Report/October 2023

SCASFAA Board Members:

President: Zachary Christian, SC Tuition Grants Commission
President-Elect: Dr. JW Kellam, Converse University
Past President: Missy Perry, Piedmont Technical College
Vice President: Regina Hailey Smith, University of South Carolina TRIO Programs
Secretary: Danielle Rymer, University of South Carolina Palmetto College
Treasurer: Michelle Upchurch, Limestone University
Treasurer-Elect: Jessie Kiser, Clemson University
Member at Large: Destra Capers, SC Student Loan
Communications Chair: Tosh Greathree, Columbia College
Communications Vice-Chair: Sara St.Pierre*, York Technical College
Conference Chair: Jennifer Williams, Clemson University
Diversity, Equity, and Inclusion Co-Chair: Kala Hudson, Converse University
Diversity, Equity, and Inclusion Co-Chair: Holly Gilliam, University of South Carolina
Electronic Services Chair: Kyle Wade, Spartanburg Methodist College
Electronic Services Vice Chair: Rachel Elkins*, Tri-County Technical College
Financial Awareness Chair: Nicole Burton, Trident Technical College
Financial Awareness Vice Chair: Ashley Pickett*, Benedict College
Financial Planning Chair: Elizabeth Milam, Clemson University
Legislative Relations Chair: Joey Derrick, University of South Carolina
Loan Agency Liaison: Ray Jones, SC Student Loan
Long Range Planning Chair: Katie Harrison, SC Tuition Grants Commission
Site Selection Chair: Sarah Dowd, Trident Technical College
Sponsorship Chair: Melanie Gillespie, Tri-County Technical College
Past-President Council Task Force: Kisha Howze, York Technical College
LEAD Coordinator: Ana Montjoy, College of Charleston

* denotes SCASFAA LEAD Program participant

Goals for 2023-2024:

Represent the State of South Carolina on the SASFAA Board; Ensure healthy and successful collaboration between the State and Regional Associations for the betterment of all members.

Motion/ Action Item(s):

None at this time.

Policy & Procedure: Changes/ Recommendations:

None at this time.

Activity Summary:

- Annual SCASFAA Transitional Board meeting held in June 2023 in Greenville, SC
- Executive Board updated the Dr. Charles Witten Professional Development Fund at our July 27 Board Meeting:
 - Increased fund to \$1,500 from \$1,000
 - Expanded uses to allow use for membership dues at the discretion of the Member at Large; cover event registration fees at the discretion of Vice President/Professional Development Committee; and to allow for an application process to cover the registration cost of the annual SASFAA NAOW for one SCASFAA member.
- Annual SCASFAA Conference held October 8 – 11 at the Marina Inn at Grande Dunes in Myrtle Beach:
 - Special Guests: Dana Kelly, NASFAA; Brad Barnett, NASFAA Past National Chair; Heather Boutell, Vanderbilt University School of Medicine; Andrew Quinn, VASFAA President-Elect; Carolyn Sparks, SASFAA Treasurer
 - Theme: “Don’t be spooked by Financial Aid, find your home in SCASFAA”
 - Charity: Palmetto Place Children and Youth Services
 - Raised \$2,500 through Silent Auction, direct donations, and Tenfold for your Billfold
 - Held a pre-con focusing on ways to assist those facing homelessness, tying into the chosen charity
 - Highest number of attendees since prior to 2014 (excluding 50th anniversary in 2016 and Virtual conference in 2020) with 137 attendees; generally average around 120
 - SCASFAA 2023-24 Award Recipients:
 - Kala Hudson, Converse University, received the SCASFAA Emerging Leader Award
 - Holly Gilliam, University of South Carolina, received the SCASFAA Achiever Award
 - Eddie Shannon, retired from SCICU, received the SCASFAA Distinguished Service Award
 - Jennifer Williams, Clemson University, received the Fearless Nine Service to SCASFAA Award



Southern Association of Student Financial Aid Administrators

Jennifer Byrd / Tennessee President

Executive Board Report / October 2023

Executive Board

President – Jennifer Byrd, Nashville State Community College

President-Elect – Samantha Sullivan, Vanderbilt University

Past President/Nominations and Elections – Charles Harper, Belmont University

Treasurer – Jo Wallace, TSAC/THEC

Secretary – Amy Wood, Meharry Medical College

Member-at-large – Isaac Jones, Middle TN State University

Member-at-large – Jamie Hamby, Cleveland State Community College

4-year Private Sector rep – Derek Moore, Union University

4-year Public Sector rep – Andrew Linn, University of Memphis

2-year Public Sector rep – Wendy Floyd, Pellissippi State Community College

TCAT Sector rep- Lucas Gray, TCAT Knoxville

Committee Chairs

Association Governance – Marian Dill, TSAC/THEC

Awards – Tina Rich, Carson Newman University

Budget & Finance – Melissa Smith, Vanderbilt University

Conference Co-Chairs – Jana Cox, University of TN Martin, and April Wolford, University of TN Knoxville

Diversity – Eric Farmer, THEC/TSAC

Electronic Services – Reed Allison, Chattanooga State Community College

Governmental Relations – Ron Gambill, ELFI

Historical – Heather Boutell, Vanderbilt Medical University

Membership – Brian Davdison, University of Memphis

Public Relations – Tori Watson, EdAmerica

Site Selection – Leah Louallen, TSAC/THEC

Sponsorship Development – Jonathan Looney, Sallie Mae

State Programs – Jason Seay, TSAC/THEC

Training – Ashley Edens, Sigcorp

Goals for 2023-2024:

- Ensure that TASFAA is represented at all SASFAA Board meetings.
- Encourage TN Financial Aid staff to join TASFAA, if not already a member.
- 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 newly approved Long-Range Plan.
- Continue to strengthen relationship with THEC/TSAC

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

- Attended SASFAA transition meeting in Orlando Florida – June 17-18th
- Sent email to College/University Presidents in TN encouraging they support their FA offices in being members of TASFAA and SASFAA
- Attended virtual SASFAA board meeting on July 10th
- Attended TASFAA transition at Montgomery Bell State Park – July 20-21st.
- Attended virtual SASFAA board meeting on August 15th.
- Accepted invitation to serve on TN Promise Special Advisory Committee as TASFAA representative

- Attended TSAC Executive Board meeting on September 26, 2023 as TASFAA representative
- Attended TASFAA Conference Committee meeting on September 28, 2023 in Cookeville TN
- Attended TASFAA Board meeting on September 29, 2023 in Cookeville TN



Southern Association of Student Financial Aid Administrators

Ryan McNamara / Virginia State President

Executive Board Report/October 2023

Executive Board

Goals for 2023-2024:

Increase membership over 2022-23

Provide more in-person and live online trainings to our members

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

VASFAA has had 3 webinars so far for our members. One on loan repayment, a mental health recharge, and a filling out the FAFSA as a homeless or foster youth.

There will be three regional workshops in October/November and a leadership workshop in November.



Southern Association of Student Financial Aid Administrators

Celena Tulloss / Association Governance

Executive Board Report/October 2023

Committee Members

Zita Barree, Hampden-Sydney College, VA
Ron Gambill, Education Loan Finance (ELFI), TN
Jacquelyn LeSueur, Mississippi State University, MS
Bill Spiers, Tallahassee Community College, FL
Leigh Ann Hussey, President-Elect, Observer
Daniel Barkowitz, President, Ex-Officio

Committee Goals for 2023-2024:

1. Complete and approve position descriptions for all elected and standing committee positions.
2. Review and propose updates as needed to any governing documents that refer to Association Governance, Governance and Planning, annual review or any related terms.
3. Evaluate the Board's goals and provide feedback based on the Long Range Plan, By-Laws, P&P and prior year annual review.
4. Provide an interim review of the status of board goals.
5. Complete the annual review and publish prior by June 30, 2024.

LRP and GAP Goal Activity to date:

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary: Committee assembled and will review the goals submitted in the October reports, to assist the board and committees with tying the goals to the Long Range Plan, By-Laws and Policies and Procedures. Position descriptions will be distributed to the 2023-24 board to review the previous submissions and make an updates, for a scheduled approval by the February 2024 meeting.



Southern Association of Student Financial Aid Administrators

Bill Ayers / Business Partners Advisory Group

Executive Board Report / October 2023

Committee Members

Association	Business Partner	Business Partner Organization
AASFAA	Andy Weaver	KHEAA
FASFAA	Kate Brabandt	College Aid Services
GASFAA	Shannon Jones	Inceptia
KASFAA	Chansone Durden	Earnest
MASFAA	Becky Davis	Ascendium
NCASFAA	Casey Wallen	Sallie Mae
SCASFAA	Kelly Savoie	Sallie Mae
TASFAA	Jonathan Looney	Sallie Mae
VASFAA	Janee Knippenberg	PNC
SASFAA	Biz Daniels	ELM
SASFAA	Bill Ayers	College Ave

Committee Goals for 2023-2024:

Overall Goal:

Our goal is to efficiently optimize the resources of the Business Partner community in support of SASFAA's mission and goals while gaining maximum exposure.

Objectives:

1. Efficiently optimize Business Partner resources

- Establish combined investment baseline for SASFAA and region states

2. Expand Business Partner community reach and membership

- Refine current best business practices
- Recruit new Business Partner to support SASFAA

3. Support SASFAA's mission and goals

- Collaborate with Sponsorship Committee to meet the 2023-24 goal
- Work in partnership with SASFAA Board to increase membership, bolster professional development/training efforts, help increase SASFAA's national profile

4. Gaining maximum exposure

- Develop new methods for interaction (year-round)
- Establish multi-year sponsorship strategy

Activity to date:

- Established monthly meeting schedule. July and August completed
- Created BP investment baseline for SASFAA and region states
- Provided feedback to Vendor Sponsor Committee
- Developed survey of Business Partner services
- Submitted Podcast feasibility summary to Communications Committee

Motion/ Action Item(s):

- Discuss the following:
 - Initiate Business Partner recruitment campaign led by SASFAA Board
 - Develop Refer-a-partner program
 - Create multi-year sponsorship commitment – Endorsed Partners
 - Launch BP member survey

Policy & Procedure: Changes/ Recommendations:

n/a



Southern Association of Student Financial Aid Administrators

Chad Sartini / Special Appointment – P&P/By-Laws Review

Executive Board Report/October 2023

Committee Members

Committee Goals for 2023-2024: Review P&P and By-Laws to ensure they are accurate and current.

LRP and GAP Goal Activity to date:

Motion/ Action Item(s): none

Policy & Procedure: Changes/ Recommendations: need to update 5/1/2023 P&P - no vote needed as these were already approved –

6.7.3) – 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.

6.7.11) – Establishing a committee listserv, 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.

Activity Summary: By-laws updated and submitted with report.