

Southern Association  
of Student Financial  
Aid Administrators  
February 2024



Agenda and  
Board  
Reports

Prepared by Secretary Nicole Patrick

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**AGENDA**  
**SASFAA Board Meeting**  
**February 23-24, 2024**  
**Orlando, Florida**

*Friday, February 23*

<b>6:00 PM</b>	<b>Board Dinner</b>	<b>Meet in Lobby</b>
<b>6:30 PM</b>	<b>U &amp; Me Revolving Hot Pot</b>	

*Saturday, October 24*

<b>7:30-9:00</b>	<b>Breakfast</b>	<b>Tesoro Cove</b>
<b>9:00 AM</b>	<b>Board Meeting</b>	<b>Journey A</b>
	Call to Order	Daniel Barkowitz
	Roll Call / Establish a Quorum	Nicole Patrick
	Welcome to Florida	Dameion Lovett
	Motion/Action Items	Daniel Barkowitz

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

*Action Item: Minutes from December 15, 2023 meeting of the board.*

*Action Item: Minutes from January 19, 2024 meeting of the board.*

<i>Action Item:</i>	<i>Conference Committee Budget increase request</i>	<b>Melanie Gillespie</b> <b>Gail Muse-Beggs</b>
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<i>Action Item:</i>	<i>Site selection fall 2024 meeting</i>	<b>Joan Bailey</b>
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<i>Action Item:</i>	<i>Association Governance (see board report)</i> <i>Proposed by-law update</i>	<b>Celena Tulloss</b> <b>Chad Sartini</b>
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	Round of Successes (2-3 minutes each)	All
<b>12:00-1:00 PM</b>	<b>Lunch</b>	<b>Bonnet Creek Ballroom</b>
	<b>New Business</b>	<b>Daniel Barkowitz</b>
	<b>Old Business</b>	<b>Daniel Barkowitz</b>
	Job descriptions	Celena Tulloss
	<b>Adjournment</b>	<b>Daniel Barkowitz</b>



**Southern Association of Student Financial Aid Administrators**

**Daniel T. Barkowitz / SASFAA President**

**Executive Board Report/February 2024**

**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. Call for volunteers and committee member vetting 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. Membership numbers have surpassed budget (which itself was a large number).
- 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. SASFAA Leadership visited Washington, DC and completed 4 Hill Visits (see below).
  - Goal 19. SASFAA as an influencer for legislative process. See above.
  - Goal 20. Provide for Congressional visits. Completed. See above.

**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. We had 97 attendees in total which includes 10 business partners, 7 presenters, and 80 registered attendees. As part of the event, led a presentation on change management theory and led the event with our event chair, Nancy Ferguson.
- 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
- Served as presenter for FAAC Forum and Management Institute in October.
- Attended 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)
- Spoke virtually at NCASFAA Fall Conference. Led two sessions, one on FAFSA Simplification, and one SASFAA Update.
- Served as moderator for SASFAA Webinars in January (Pell) and February (Conference Preview).

- Created, promoted, led and organized SASFAA pop-up webinar entitled “FAFSA Delays! Now What?” Event was opened for all (members and non-members) with 1213 registrants from 36 states (including staff from FSA and NASFAA). Panel was extremely successful and used the event to promote membership for both 2023-24 and 2024-25. Current member registration was 672. Lapsed member registration was 129. Non-member registration was 412. Registration from member states was 922.
- As part of a SASFAA Delegation, made three Hill Visits in February 2024 with Bobby Scott’s staff (VA) (House Ranking Member of the Education Committee), Virginia Foxx’s staff (NC) (Chair of the Education Committee) and Alma Adams (NC) with staff (Education Committee member).
- Presenting a variety of sessions at the SASFAA Annual Conference, pre-conference, Director’s summit, and other events. Serving as host and convenor for conference.
- Making plans to attend NCASFAA Spring Conference and FASFAA Annual Conference as the SASFAA representative.

DANIEL T. BARKOWITZ





**Southern Association of Student Financial Aid Administrators**

**Leigh Ann Hussey, President-Elect**

**Executive Board Report/February 2024**

**Committee Members**

- 2025 Conference Chair - Leah Louallen

**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
- Attended the Fall 2023 KASFAA conference and presented 3 sessions
- January 2024 site visit to Greenville, SC (2025 conference location)
- Attended NASFAA Legislative & Leadership (Association Leadership Track) and subsequent Hill Visit with SASFAA Leadership



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

**Michael D. Morgan / Past President**

**Executive Board Report / February 2024**

### **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 60<sup>th</sup> anniversary to be used for future SASFAA promotions and archive.

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

- 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
- Worked with Electronic Services Chair and Communications Chair to announce and opened the SASFAA elections
- Ordered plaques of rotating off Elected Board members and Award nominees

### **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/February 2024**

### **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, Celena Tulloss, Chad Sartini, and April Tretter will facilitate.
  - Goal of 25 attendees, cost is \$200.
  - Registration opened in October when Annual Conference registration opened.
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 opened in October when Annual Conference registration opened.
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 6<sup>th</sup> 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.

The membership was asked to provide suggestions for session topics for the conference. We received 43 responses. This meets the objective to “Continue to use evaluation feedback, membership surveys and national trends to develop training topics and programs”.

The NAOW meets the goal to “Provide annual training opportunities to aid officers with less than 3 to 5 years of experience that increases knowledge and passion for the profession.”

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

N/A

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

N/A

#### **Activity Summary:**

1. Webinars: Completed 8 of the webinars to date.  
FAFSA Simplification Planning and Project Management: 544 people registered. (OPEN)  
It's FISAP Time: 166 people registered.  
Delayed FAFSA: Communication and Outreach Strategies: 330 people registered.  
COA Budget Policy Development and Data Collection Methods for COA Components: 366 people registered  
SASFAA Town Hall Post-FSA Conference: 327 people registered  
Epic Changes to Pell Grant Awarding Coming Your Way: 491 people registered  
FAFSA Delays! Now What?: 1213 people registered (OPEN)  
Preview of the 2024 SASFAA Annual Conference: 335 people registered (only 100 able to join because it was a meeting instead of webinar. Was posted online the next day.)

Two webinars were 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. October FAAC Exam Prep Workshop: 15 participants registered, 4 presenters.
4. Conference VIPs confirmed: Melanie Storey, David Bartnicki, Dana Kelly, Justin Draeger, Danette Burgess, Craig Slaughter, and Helen Faith for the conference.
5. February FAAC Exam Prep Workshop: 18 participants registered, 4 presenters.
6. Pre-Conference sessions (COA and Pell): 35 participants
7. Directors Summit: 55 participants, 10 Sponsors, 10 presenters
8. NAOW will be held at Converse University June 2-7, 2024 with instructors and staff reporting on May 31<sup>st</sup>. Registration and Scholarship application will open this week.  
Staff approved:

#### **Instructors**

Rockey Christensen	Johnson University
Daniel Barkowitz	University of Miami
Zilma Lopes	Robeson Community College
Megan Smith	Delta State University
Jaime Missimer	Pearl River Community College
Audrey White	UNC Chapel Hill
Jana Cox	UT Martin
Nicole Burton	Trident Tech, SC
Edward Schworn	Florida International University
Bob Fultz	University of Kentucky

Biz Daniel	Elm Resources
Chester Priest	KHEAA
Chad Sartini (Curriculum Coordinator)	Virginia Western Community College
JW Kellman (Site Coordinator)	Converse University
Katie Conrad (Vice President)	Florida International University

9. NAOW Staff Retreat will be held at Converse University and the Marriott March 15-17.



**Southern Association of Student Financial Aid Administrators**

**Nicole Patrick/ Secretary**

**Executive Board Report / February 2024**

**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 / February 2024

### **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:**

- 11.07.2023: Paid business owners insurance premium to The Hartford Insurance Company
- 12.07.2023: Reviewed and approved payment to Embassy Suites North Charleston for the October 2023 board meeting
- 12.20.2023: Paid ascap music licensing fee
- 01.05.2024: Submitted annual ascap report.
- 01.05.2024: Submitted all required documents to Mike Dunn, SASFAA's CPA, for filing of the association's 2022 IRS Form 990.
- 01.09.2024: Submitted annual BMI report.
- 01.09.2024: Direct Bill Request submitted to the Embassy Suites Orlando Lake Buena Vista Resort in preparation for the Transition Board Meeting in July 2024.
- 01.18.2024: Domestic Nonprofit Corporation renewed and paid with the State of Georgia's Secretary of State's Office (\$30 fee)
- 01.29.2024: Mailed 1096 form and 1099-NEC forms to the IRS. 1099 forms sent to Jeff Dennis and Jonathan David Stephens for services provided in 2023.
- 02.09.2024: Requested, processed and mailed prepayment of \$80,000 toward the master bill for the Wyndam Grand Orlando Resort Bonnet Creek. Thank you to Jeff Dennis for the quick turnaround in taking care of this without much advanced notice.
- Submitted monthly SASFAA credit card statements and receipts to Jeff Dennis, SASFAA Bookkeeper before requested deadlines.
- Reviewed and approved reimbursement requests in a timely fashion.
- Participated in Conference Committee meetings and monthly Board Meetings.

Respectfully submitted,

Carolyn Sparks

SASFAA Treasurer





**Southern Association of Student Financial Aid Administrators**

**Jenelle Handcox / Budget and Finance Chair**

**Executive Board Report / February 2024**

**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
- New contracts reviewed

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

Operating Funds (15-25% target) – Bank Accounts	\$ 268,577.91	Currently 23%
Short Term (30-45% target) – Advisory Solutions	\$ 455,837.32	Currently 40%
Long Term (30-45% target) – Charles Schwab	\$ 418,891.83	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)	\$ 1,143,306.06
Prior Year Ending Budget	\$ 394,000
Outstanding Contractual Agreements	\$ 621,286
Balance	\$ 128,020
20% maximum transfer from assets	\$ 25,604

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

- None to report

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

- None to report

### **Activity Summary:**

- Monthly detailed expense reports are scheduled on the 20<sup>th</sup> of each month. Elected Officers and Committee Chairs will receive this information via email throughout the fiscal year. The emails are auto-generated with SASFAA as the sender. Officers and Chairs should review the reports monthly and inform me of any discrepancies.
- Monthly Budget vs. Actuals reports are scheduled on the 16<sup>th</sup> of each month. All Executive Board members will receive this information via email throughout the fiscal year. Board members should review the report in order to serve as diligent stewards of the dollars entrusted to you.

### **Outstanding Contractual Obligations:**

- **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 90%
  - 30 complimentary 6ft exhibition tables
  - 10 shipping boxes received complimentary
  - Wyndham Rewards points for designated official**Total liability: \$324,000**
- **Spartanburg Marriott**, NAOW Instructors Retreat, 3/15/2024 – 3/17/2024, \$7260
  - Room rate is \$229 plus 13.2%
  - 28 contracted room nights
  - Complimentary self-parking
  - Complimentary Wi-Fi in guest rooms**Total liability: \$7,260**

- **Converse College, NAOW, 5/31/2024 – 6/7/2024, \$36,875**
  - Room rate varies from \$21 - \$25 per person per night (est. \$15,625)
  - Meals at \$29 per person per day (est. \$18,125)
  - Facilities fee is \$5 per person per day (est. \$3,125)
  - Total liability: \$36,875** (estimated assuming 125 total attendees)
  
- **Hyatt Regency Greenville, Annual Conference, 2/14/2025 – 2/19/2025, \$233,900**
  - Room rate is \$185 plus 13%
  - 940 contracted room nights
  - \$60,000 banquet food and beverage minimum
  - \$10 rebate for each sleeping room night credited to master account
  - 1/45 complimentary room ratio
  - Meeting Rooms & Exhibit Hall rental fees waived
  - Complimentary Presidential Suite upgrade at the group rate (5 nights)
  - Complimentary Atrium Suite at the group rate (5 nights)
  - Three One Bedroom Panorama Suite at the group rate (5 nights)
  - Three Staff rooms at discounted rate of \$135 per night (5 nights)
  - Five Deluxe King upgrades at the group rate
  - Three complimentary Valet Parking Passes for up to 5 days each
  - 20% discount on 2024 in-house audio-visual pricing or waived fees for outside provider
  - Discounted exhibitor fees of \$25++ per tabletop
  - 10% Master Rebate Incentive sponsored by Visit Greenville SC
  - Complimentary access to fitness center
  - Complimentary basic Wi-Fi in guest rooms & meeting space
  - Group rate available 3 days pre/post subject to availability
  - Attrition at 80%
  - 30 complimentary 6ft exhibition tables
  - 10 shipping boxes received complimentary
  - World of Hyatt points for designated official
  - Total liability: \$233,900**
  
- **Embassy Suites by Hilton Orlando – Lake Buena Vista Resort, 2024 Transition Meeting, 7/12/2024 – 7/14/2024, \$19,251**
  - Room rate is \$159 plus 12.5%
  - 97 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 \$14.00 (reduced from \$20.00)
  - 50% discount on one Projector Package

- Attrition at 85%
- Hilton Honors points for designated official

**Total liability: \$19,251**



## Southern Association of Student Financial Aid Administrators

### Balance Sheet As of June 30, 2024

	TOTAL
<b>ASSETS</b>	
Current Assets	
Bank Accounts	
2 BB&T Checking-ACH Only	100.00
BB&T Checking	217,583.04
BB&T Savings	47,924.79
Edward Jones-Money Market	2,969.08
<b>Total Bank Accounts</b>	<b>\$268,576.91</b>
Accounts Receivable	
Accounts Receivable	0.00
<b>Total Accounts Receivable</b>	<b>\$0.00</b>
Other Current Assets	
6 Prepaid Expenses	0.00
Advisory Solutions 20/80 @ Edward Jones	455,837.32
Charles Schwab (NASFAA)	418,891.83
Undeposited Funds	0.00
<b>Total Other Current Assets</b>	<b>\$874,729.15</b>
<b>Total Current Assets</b>	<b>\$1,143,306.06</b>
<b>TOTAL ASSETS</b>	<b>\$1,143,306.06</b>
<b>LIABILITIES AND EQUITY</b>	
Liabilities	
<b>Total Liabilities</b>	
Equity	
Opening Balance Equity	757,980.87
Retained Earnings	241,982.79
Net Income	143,342.40
<b>Total Equity</b>	<b>\$1,143,306.06</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$1,143,306.06</b>



**Southern Association of Student Financial Aid Administrators**  
**Gail Muse Beggs and Melanie Gillespie – Conference Committee Chair**  
**Executive Board Report/February 2024**

**Committee Members:**

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
Steven Wilson	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.
- The Conference Committee is committed to keeping conference expenses to a minimum whenever possible, in terms of decorations and other random expenses. The Conference Co-Chairs are committed to keeping food costs and other hotel-driven standard conference expenses as low as possible.
  - Breakfasts were cut to coffee stations and brain fuel bags to save \$40,000
  - In lieu of plated lunches, gift cards are provided to all 550 registrants at a savings of over \$40,000.
  - AV expense was negotiated to save over \$30,000

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

- None

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

- Budget Increase to \$215,000

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

- We do not have any at this time.

**Activity Summary:**

- Melanie and Gail held monthly committee meetings to make sure the entire committee was on task and to assist as needed.
- Mid-February, 2024 – two weeks prior to the conference, we met with the Conference Committee individually, based on assignment. Final plans were made.
- Conference Committee is scheduled to arrive by 1:00 Saturday, February 24 to begin and complete conference set-up.



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

**Biz Daniel / Sponsorship Chair**

**Executive Board Report/February 2024**

### **Committee Members**

Bill Ayers – College Ave  
Janee Knippenberg – PNC  
Melanie Gillespie – Tri-County Technical College  
Gail Beggs – Coastal Alabama Community College  
Katie Conrad – Florida International University

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

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):**

N/A

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

N/A

### **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.

#### **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
- Invitation Letter was sent to all prospective Sponsors inviting them to be a part of SASFAA
- 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 space @ the annual conference – College Ave, MeadowFi, and FAS, (\$500 each)

#### **October – February:**

- Actively recruited sponsors for SASFAA
  - Total # of Sponsors = 42 (16 new sponsors)
    - 3 Leadership Level
    - 14 Advocacy Level
    - 25 Support Level
  - Contributor = 1
- Secured \$132,400 in total sponsorship:
  - Sponsorship of Conference \$114,000
  - Sponsorship of a-la-carte items \$ 5,600
  - Sponsorship at Management Inst. \$ 12,800
- Worked with the Conference Chair and Conference Committee on the planning and execution of the upcoming conference in February 2024.
- Established multiple floor-plan options based on suggestions of the Conference Center and potential space constraints. Will work with the Conference Chair/Committee to adjust and accommodate as needed.
- Maintained regular communications with the Sponsors to secure sponsorships, registrations, logos, advertisements, commitments to additional items related to the charity auction and additional conference activities.
- Participated in the Business Partner Advisory Group Committee (BPAGC) meetings with the Special Projects Chair to reinforce the “We” culture and support for SASFAA’s Sponsors.
- Discussed upcoming conference initiatives and received suggestions from the BPAGC for conference related items.
- Upcoming Plans & Activities
  - Work with the Conference Chair and committee to execute the SASFAA’s Conference in Orlando, Florida in February 2024.
  - Provide any updates of new Sponsors to the Electronic Services team working on the SASFAA Services Directory for addition to the document.
  - Continue to meet regularly with Special Projects Chair (Business Partner Chair) to:
    - Brainstorm on collaboration opportunities with states and regions.
    - Participate in the scheduled BPAGC meetings.
    - Collaborate and support Special Projects Committee Planning
  - Other activities as requested by the Executive Board



**Southern Association of Student Financial Aid Administrators**  
**Michelle Hemmer / Communications and Outreach Committee Chair**  
**Executive Board Report / February 2024**

**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 / February 2024**

### **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 the 2024-25 Election page and created the Election Buddy site
- Created step-by-step instruction for the following areas:
  - ElectionBuddy
  - Zoom Webinar creation and adding panelist
  - How to update Sponsor Banner
- Updated other areas of the website as requested



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

**Rachelle Feldman / Legislative Relations Committee**

**Executive Board Report / February 2024**

### **Committee Members**

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

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

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 went back to their states and asked these questions to try to make priorities. We landed on continuing to update members on legislative and regulatory news, particularly highlighting significant announcements from ED or negotiated rulemaking and trying to produce some kind of advocacy toolkit for the website similar to NASFAA's state advocacy toolkit.

Work on the toolkit has begun but I'm not sure it will be complete by year end or if it will continue to the new year. The group did put together some ideas to gather input from SASFAA members and are working with Kathy Hastings to do an interactive session at the SASFAA conference gathering members ideas of how we could reform verification to reduce melt.

Earlier this month we spent a day on Capital Hill with our SASFA President, Vice-President, President Elect, Joan Bailey, Jackie Copeland, and me as Legislative Chair. We met with the professional staff of the House majority and minority HELP committees and with committee member and representative Alma Adams. We were able to advocate for administrative relief for the FAFSA delay as well as give well received suggestions for technical amendments to the FUTURE act and feedback on the College Cost Reduction Act.

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

None

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

None Yet

**Activity Summary:**

See above under goals



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

**Sarah Baumhoff/ Membership Chair**

**Executive Board Report / February 2024**

### **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):**

**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.

Created SignUp for working Registration Desk during Conference

Contacting individuals about membership as questions are received.



**Southern Association of Student Financial Aid Administrators  
Joan Bailey/ Site Selection Chair  
Executive Board Report/February 2024**

**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 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.
- 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 and facilitated the execution of that contract
- Conducted 2025 conference site visit
- Solicited proposal for Fall 2025 board/conference/fall training at 2025 Conference Hotel

**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/February 2024**

#### **Committee Members**

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

#### **Committee Goals for 2023-2024:**

- Provide ideas for the annual conference, workshops, and webinars.
- Administer the SASFAA Diversity Leadership Program.
- Evaluate the SASFAA Diversity Leadership Program (DLP) with feedback from participants, mentors, and committee chairs.
- Evaluate the SASFAA Diversity Statement for updates or improvements.

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

N/A

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

N/A

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

N/A

#### **Activity Summary:**

Following the SASFAA October Board Meeting, given the assumption that attendance would exceed hotel capacity, the Chair worked to ensure the Diversity Leadership Program (DLP) participants were registered for the 2024 SASFAA Conference before the general registration announcement. The Chair also worked with the Site Selection Chair to ensure the participants' reservation information for the hotel was collected and booked accordingly.

In October, the Chair suggested having a session related to navigating challenges to minority-targeted scholarships in response to the U.S. Supreme Court ending of affirmative action in college admissions on June 29, 2023.

The Equity, Inclusion, and Global Issues Committee met on November 30 to discuss possible updates and changes to the SASFAA Diversity Statement. In lieu of making a minor update, the committee agreed to further review the statement to determine if a more holistic revision was merited. The Committee also shared their respective anger, despair, exhaustion, and challenges arising from the fallout of the U.S. Supreme Court ending of affirmative action in college admissions on June 29, 2023, and the nationally orchestrated

bombardment of anti-LGBTQ legislation and lawsuits arising from state legislative chambers and interest groups. The committee adjourned united in spirit against divisive legislation still considering how SASFAA might constructively respond.

In early December, the Chair worked with the Treasurer and Bookkeeper to ensure the DLP participants' flight expenses to SASFAA were reimbursed.

In January, the Chair began working on survey instruments for the past DLP participants to gather information on their experiences over the last three years of its operation. It is anticipated that the survey will be released in March.





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

**Cierra Smith, Alabama State President**

**Executive Board Report/February 2024**

### **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: Taylor Hilyer, Alabama Community College System
- Secretary: Ashley Martin, University of Alabama in Huntsville
- Treasurer: Gail Muse Beggs, Coastal Alabama Community College
- Treasurer-Elect: Vicki Johnson, Coastal 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.
- ❖ Website update.

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

- ❖ None at this time.

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

- ❖ None at this time.

### **Activity Summary:**

- ❖ AASFAA is continuing to work from the 2023-24 calendar and preparing for 2024-25.
- ❖ AASFAA's Bylaws and Policy & Procedure Committees have presented a policy and procedure for review by the executive board.
- ❖ AASFAA's Membership Committee Chair position is vacant and down to one member on the committee due to individuals leaving the profession. Working to rebuild the committee and continue recruiting members, specifically in the 4-year sector.
- ❖ Tax-exempt status paperwork has been submitted and we were denied. Reviewing documentation and inquiring with the state on why the application was denied.
- ❖ AASFAA has transitioned to a new website provider, StarChapter.



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

**Dameion Lovett, FASFAA President**

**Executive Board Report/February 2024**

### **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, Merrian King, St. Petersburg College (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, Florida International University
- Early Awareness/Outreach/Financial Literacy Chair, Ilia Cordero, Valencia College
- Graduate/Professional Chair, Melissa Toohey, University of South Florida-Health
- Vocational/Technical/Clock Hour Chair, Jeanne Schurman, 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:**

- September 23: Worked with webinar coordinator on the year's training schedule
- December 23: Preliminary visit to 2024 conference hotel with site selection and vendor/sponsor chairs prior to hotel's official opening
- December 23: Worked with bookkeeper and immediate past president on preparing required documents for the external audit
- Assigned to local arrangements for SASFAA annual conference; prepared Florida hospitality basket and other local arrangement duties to be completed at the conference
- January 29, 2024: Sent State of the Association to the membership to keep them informed on the association's activities
- January 31, 2024: Worked with the Early Awareness chair to help organize and 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); guidance counselor financial aid & FAFSA training session
- February 20, 2024: Partnered with the above and high school districts across the state to promote FAFSA completion in spring 2024; FAFSA walkthrough for students & families
- FAFSA current membership stands at 836



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

**Kristie Teasley / Georgia President**

### **Executive Board Report/February 2024**

#### **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:**

Monthly “Vibe Check” with GASFAA Board

GASFAA Webinars held

- November 8<sup>th</sup>-Duolingo for Financial Aid! Do you know how to Speak FAFSA Simplification
- December 14<sup>th</sup>-The 12 Gifts of FAFSA Simplification
- February 7<sup>th</sup>-Addressing the Challenges of Federal Work Study and Inability to Transfer SEOG

Meetings regarding Sched collaboration

President Elect-Emmilee Mitchell attended NASFAA Leadership and Legislative Conference

Planning for upcoming Winter Workshop and Annual Conference

#### **Upcoming:**

Winter Board Meeting-March-Virtual

Next Webinar scheduled:

- March 6<sup>th</sup> titled Delving into Withdrawal Regulations
- April 24<sup>th</sup> Reflecting on what we have learned: How has FAFSA Simplification Impacted our Awarding Process

Winter Workshop March 11<sup>th</sup>-12<sup>th</sup> University of North Georgia, Dahlonega Campus

Spring Board Meeting May 20<sup>th</sup> -Lagrange, GA

Annual Conference May 21<sup>st</sup>-May 23<sup>rd</sup> at Great Wolf Lodge, Lagrange, GA



## Southern Association of Student Financial Aid Administrators

Michelle Standridge/ Kentucky President

Executive Board Report / February 2024

### 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 2022-2023:

- 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 assisted fall conference chair Dawn Graviss execute a successful fall conference. Kentucky had special guests Katie Conrad and SASFAA President-Elect, Leigh Ann Hussey. Attendance was 166 attendees with just over 30 New Aid officers.

President Standridge has worked with Danielle Robbins, the communication chair to update the newsletter via SWAY in hopes to reach the membership in a modernized manner.

President Standridge worked with Vice President Amy Smith to offer a regional NASFAA U training on November 9<sup>th</sup> on the ECTC campus. 3 separate NASFAA U credential courses were offered and 19 individuals attended.

A survey was sent to the KASFAA membership to guide the board on what future training needs are. The survey was a result of conversations on if 2 full conferences are a sustainable format for the state organization or if we should start the shift to look at one strong conference and other type trainings throughout the year. Will survey responses were low compared to total membership, all that responded supported the board exploring other options. Results were shared with President Elect Robyn Sollberger as she works to plan her year.

On December 11<sup>th</sup>, President Standridge met with Casi Benedict, the outreach chair and several other key individuals to make plans to coordinate with KHEAA to offer FAFSA Sunday Funday in February. The date of February 4<sup>th</sup> was chosen but later pivoted to be the entire month of February due to FAFSA delays and FAFSA website issues/concerns. KHEAA coordinated a main page for sites to register and for KHEAA to then advertise. KHEAA also is offering 2 \$500 scholarships to be awarded randomly to individual who attend one of the FAFSA Sunday Funday events. To date, there are over 38 separate community events planned with the label, FAFSA Sunday Funday.

On January 31<sup>st</sup>, President Standridge sent an email to the KASFAA membership after it was announced there would be further delays. The email was to offer support and concern to the membership and to remind them of the importance of our work.

Plans are well under way for the KASFAA Spring conference to be held in April at the Campbellhouse in Lexington, KY. KASFAA will host Emilee Mitchell, Tennessee's President Elect. Spring conference theme is K•A•S•F•A•A 2024 Spring Conference, FRIENDS: The One Where We Get Through This Together.



**Southern Association of Student Financial Aid Administrators**

**Heather Dearman / Mississippi President**

**Executive Board Report/February 2024**

**Executive Board**

President	Heather Dearman
Past President	Terry Bland
President-Elect	Clate Holleman
Vice President	Jaime Missimer
Secretary	Deana Middleton
Treasurer	Arlisha Walton
Treasurer-Elect	Katie Stroup
Member-At-Large	Sarah Grace Broom
Director	LaShanda Chamberlain
Director	Bob Walker
Director	Tawesia Colyer

**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:**

Changed savings account to a CD to increase the benefit/interest accrued

Consolidated two checking accounts into one

Began adding credit card fees to transactions completed by credit cards for participants and business partners

Hosting a state aid webinar on March 8.

State FA101 training will be held March 26-28 and annual conference April 24-26.





**Southern Association of Student Financial Aid Administrators**

**Rachel Cavanaugh /North Carolina President**

**Executive Board Report/February 2024**

**Executive Board**

**Goals for 2023-24:**

Hold a wonderful virtual fall conference November 6-7, 2023. Conference was successful  
Increase membership (hold a new members luncheon at spring conference)  
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/February 2024**

### **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 to date:**

- 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 50<sup>th</sup> 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
- Virtual “Watercooler” Discussion held February 7<sup>th</sup> to provide members an opportunity to discuss their thoughts and potential plans following the updated 2024-25 FAFSA & ISIR timeline
- Upcoming SCASFAA Events:
  - SCASFAA at the Watercooler: SASFAA Conference Recap & General Updates – March 6, 2024 (Virtual)
  - NAOW Training – April 8-9, 2024 (in-person)
  - Back to the Future Professional and Personal Development Training – April 24, 2024
  - Leadership Symposium – May 21, 2024 (in-person)
  - Additional “SCASFAA @ the Watercooler” and other training webinars – TBD
  - SCASFAA Transition – June 11-12, 2024



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

**Jennifer Byrd / Tennessee President**

**Executive Board Report / February 2024**

### **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, Mississippi 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 Welford, 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 TASFAA fall training at Nashville State Community College – October 11 -12, 2023
- Sent email to TASFAA membership to celebrate Financial Aid Day on October 18, 2023
- Sent email to TASFAA membership to encourage volunteers for Presenters at NASFAA on October 19, 2023
- Attended SASFAA Executive Board meeting on October 21, 2023 at North Charleston, SC
- Attended virtual SASFAA board meeting on November 9, 2023
- Sent email to the TASFAA membership regarding the opening of the 2024-2025 FAFSA by December 31<sup>st</sup> -on November 15, 2023
- Attended FSA Virtual Conference November 28-30, 2023
- Attended virtual TN Promise Advisory Committee meeting as the TASFAA representative on December 6, 2023
- Sent email to TASFAA membership regarding the College Access Survey link still being open as discussed in the December 6<sup>th</sup> meeting of the TN Promise Advisory Committee on December 7, 2023
- Attended virtual TASFAA Conference committee meeting on December 8, 2023
- Attended virtual SASFAA board meeting on December 15, 2023
- Sent email to TASFAA membership about upcoming soft launch of the 2024-25 FAFSA on December 19, 2023
- Sent email to TASFAA membership regarding the status of the FAFSA soft launch on January 3, 2024
- Attended TASFAA Conference Committee meeting on January 11, 2024 in Murfreesboro, TN
- Attended TASFAA Board meeting on January 12, 2024 in Murfreesboro, TN
- Attended virtual SASFAA board meeting on January 19, 2024
- Attended virtual TASFAA Governmental Relations Committee meeting January 29, 2024
- Sent email to TASFAA membership regarding FAFSA delays and impact to schools on January 30, 2024
- Attended a virtual meeting of the TASFAA executive board on February 2, 2024 to review and vote on advocacy letter regarding Workforce Pell Bill.
- Advocacy letter was printed and sent with President-Elect Samantha Sullivan to DC February 8, 2024 and also emailed to Congress members.
- Sent email to TASFAA membership regarding the advocacy letter sent to Congress about Workforce Pell Act on February 8, 2024
- Sent email to TASFAA membership regarding verification relief that was published in NASFAA news on February 13, 2024



**Southern Association of Student Financial Aid Administrators**

**Ryan McNamara / Virginia State President**

**Executive Board Report/February 2024**

**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 a great year so far. We have offered 10 virtual webinars, 3 in person workshops, and one Leadership Summit.

Our Annual Conference will be April 14-17 at the Omni in Charlottesville, VA.

We currently have 543 active members.



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

**Celena Tulloss / Association Governance**

**Executive Board Report/February 2024**

### **Committee Members**

Zita Barree, Hampden-Sydney College, VA

Ron Gambill, Education Loan Finance (ELFI), TN

Jacquelyn LeSueur, Mississippi State University, MS (stepped down 1/16/24)

Marian Dill, Tennessee Student Assistance Corporation (TSAC), TN (began 1/18/24)

Chad Sartini, Virginia Western, VA (began 1/3/24)

Bill Spiers, Tallahassee Community College, FL

Leigh Ann Hussey, President-Elect, Observer

Daniel Barkowitz, President, Ex-Officio

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

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. **COMPLETED:** 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:**

LRP GOAL: 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.

- Objective: Explore new ways to measure Board Effectiveness and determine the best process to be used going forward. (possibly replace current GAP practices while keeping in mind an evaluation must be done to retain our Non-profit status)

To facilitate this objective under the LRP Goal, the Association Governance committee reviewed all of the board goals for 2023-24 and provided recommendations to the respective committee chairs. Goals may be modified or added by the committees to address LRP goals that were not currently addressed in their committee goals.

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

A committee review of the By-Laws and Policies and Procedures reveal that a change to the By-Laws was never brought to a membership vote, to reflect the changes approved by the Board in regard to the responsibility for the completion of the annual report or the new "Association Governance" committee.

There are currently inconsistencies in previous GAP reports and the P&P as to the name of the committee. It is referred to as "Association Governance", "Associational Governance" and "Association Governance and Planning".

The committee moves that the name of the committee be officially approved and recorded as "Association Governance" and the required changes to the By-Laws be brought before the membership for electronic vote as soon as possible, but no later than June 30, 2024.

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

The policies and procedures should be updated to reflect the new and accurate name of the committee and duties based on the By-Law vote.

**Activity Summary:** Committee reviewed 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. Feedback was provided to Committee Chairs.

The electronic position description document was distributed to the 2023-24 board to review the previous submissions but no feedback was received. Time will be allotted in the agenda for the February, 2024 meeting to review and update physical copies for approval at an upcoming virtual meeting.





## Southern Association of Student Financial Aid Administrators

### Bill Ayers / Business Partners Advisory Group

#### Executive Board Report / February 2024

#### 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

#### **December 2023 to February 2024 Activity**

- BP group convened to review conference requirements, led by Biz
- The Business Partner Advisory Group continues to express its support for the Pod as a potential sponsor/advertising opportunity. Levels of investment are contingent on the final product.
- Production of the Pod is primarily dependent on the school(s) to host. Several institutions with mass communication and media programs in the SASFAA region have been identified (see attached). Outreach communication TBD.
- A preliminary production timeline is attached. Currently, a 9-month implementation plan seems reasonable.

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

- Discuss the following:
  - Review Podcast concept and production plan
  - Discuss the creation of a Podcast subcommittee

#### **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/February 2024**

**Committee Members:** Chad Sartini

**Committee Goals for 2022-2023:** Review P&P and By-Laws to ensure they are accurate and current.

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

**I. ORGANIZATIONAL STRUCTURE**

**BY-LAWS**

**GOAL:** Ensure the association is legally sound.

**OBJECTIVE:** Review the by-laws annually. Make changes sparingly and judiciously.

**ACTIVITY:** Annual review of by-laws complete.

**POLICIES AND PROCEDURES**

**GOAL:** Policies and procedures shall be reflective of current practices and shall be compliant with by-laws.

**OBJECTIVES:**

The elected board and committee chairs shall continuously review P&P.

Board and committee chairs shall document their review of the P&P.

When updated, a new P&P shall be created as to keep historical information intact.

**ACTIVITY:**

Have begun the reviewing the current P&P and board meeting minutes from the past 5 years. No findings to report to date.

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

Proposed by-law change:

**ARTICLE VII – DUTIES OF OFFICERS**

**Current verbiage:**

**Section 4.** The immediate past president shall assist the president and serve as Chair of the Nominations Committee, the Committee on Awards and the Governance and Planning Committee. In the event of the absence or disability of both the president and the vice president, and with the concurrence of the Board, this officer shall have all the powers and perform all the duties of the president. The immediate past president shall serve as the SASFAA voting representative of the Board of Directors of NASFAA. The immediate past president shall also serve as parliamentarian of the Association.

Remove comma after Nomination Committee and replace with and. Remove the Governance and Planning Committee.

**Updated verbiage:**

**Section 4.** The immediate past president shall assist the president and serve as Chair of the Nominations Committee and the Committee on Awards. In the event of the absence or disability of both the president and the vice president, and with the concurrence of the Board, this officer shall have all the powers and perform all the duties of the president. The immediate past president shall serve as the SASFAA voting representative of the Board of Directors of NASFAA. The immediate past president shall also serve as parliamentarian of the Association.

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

**Activity Summary:** See above.