

Southern Association
of Student Financial
Aid Administrators
July Board Meeting

Agenda and Board Report



Prepared by Secretary Tarik J. Boyd

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AGENDA
SASFAA July Board Meeting
Norfolk Hilton the Main
July 12-14, 2019
Meeting Room – Momentum

“A leader says, “I will go; follow me!” *Robert Greenleaf*

Friday, July 12, 2019

2:00 PM	State Presidents Meeting (Ghent)	Nathan
6:00 PM	Dinner on Own	All
9:00 PM	Hospitality	The Grain

Saturday, July 13, 2019

8:00 AM	Breakfast Buffet (vouchers)	Varia
8:30 AM	Call to Order	Bill
	Establish a Quorum	

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

	Welcome to Virginia	Brad
9:00 AM	Approval of Prior Minutes	Tarik
	<ul style="list-style-type: none"> • June Transition minutes posted with corrections on 7/8/19 	
	Motion/Action items	
	<ul style="list-style-type: none"> • Recommendation for UOWF NAOW • Recommendation for fall workshop fee \$300 • 2019-20 Budget • Conference Contract for Robert Weinerman 	Celena Joan B. Marian Joan Z.
10: 15 AM	Break	
10:30 AM	New Business	
	<ul style="list-style-type: none"> • Sponsorship non vending appeal form 	Michael
	Old Business	
	<ul style="list-style-type: none"> • Hotel Points • NAOW location • Policy on Vendors attendance and cost • Policy & Procedure Review 	

12:00 PM	Lunch	Buffet
1:00 PM	Round of Successes (2-3 minutes)	
6:00 PM	Dinner at Hell's Kitchen	
9:00 PM	Hospitality - Meet in the Grain	



Southern Association of Student Financial Aid Administrators

Bill Spiers, President

Executive Board Report/July 2019

Committee Members

Executive Board

Committee Goals for 2019-2020:

SASFAA President's Goals 2019/2020

- Have all By-laws and Policies and Procedures reviewed for accuracy, completeness, clarity, and compliance with current laws.
- Provide each member of the Board with SASFAA legal documents, inclusive of all documents pertaining to their specific position. Provide a time for discussion at the Transition meeting.
- Establish a task force to develop policies and procedures on sexual harassment and review policies and procedures for legal compliance.
- Establish a board that is representative of the diversity of SASFAA.
- Have all members who volunteer assigned to a committee.
- Have an organized membership drive to increase membership.
- Provide training for all sectors.
- Provide timely and pertinent information to the membership
- Write a blog after each Board meeting.
- Develop and social media policy.
- Provide Board members with dates they are responsible to write for the blog.
- Provide outstanding training events throughout the year, inclusive of in person and online training opportunities.
- Provide a legal issues workshop.
- Provide adequate budget for training events for the membership.
- Work with the VP for Training to ensure all sectors are being served through SASFAA training events.
- Provide fiscal training to all Board members to make sure they understand SASFAA policy and procedures on spending and budget creation.
- Continue exploring the possibility of a part-time bookkeeper.
- Review all investments to see if we are maximizing earnings while being fiscally conservative.
- Keep SASFAA fiscally prudent.
- Educate the membership on the cost of conferences and training events.
- Continue keeping the membership apprised of legislative activities.
- Review the SASFAA Legislative Guide to make sure it is up to date.
- Review hill visits to ensure they are fully reflective of the membership

- Communicate with Congress and the US Department of Education on issues where consensus exists and inform the membership when and if such communication occurs.
- Encourage the membership to participate in legislative advocacy.

LRP and GAP Goal Activity to date:

Provided every Board member a copy of the By-Laws and Policy and Procedures Manual with a request that they review the areas pertaining to their responsibilities. LRP 1

Provided Policy and Procedures training in the Board transition meeting. LRP1 and 4

Provided fiscal training in the Board transition Meeting. LRP1 and 4

Established a diverse board LRP1

Sent membership and email encouraging continued membership and participation in SASFAA. LRP2

Had all Board members sign SASFAA legal documents LRP1

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

Since the last Board meeting the President has been involved in multiple activities representing SASFAA. He has attended NASFAA Board orientation, NASFAA investment training, and served as an observer at the NASFAA Board meeting in conjunction with the NASFAA conference.

In addition, he has conducted the Transition meeting which included training on the budget, travel, Policies and procedures and general Board Training. The Board also examined the “Why” of SASFAA during the Transition meeting, which provoked a good deal of thoughtful discussion. Each Board member also signed the appropriate legal documents required for Board participation.

Prior to the Board meeting he will be meeting with the Past-President, Treasurer, and Budget/Finance Chair to begin establishing the annual budget. Every effort will be made in the meeting to be fiscally prudent.

He has also sent an email to the membership encouraging them to renew their membership and consider being active in SASFAA. While at NASFAA he used the opportunity to meet with several SASFAA members to encourage them to seek leadership roles in the Association.

After NASFAA he met with the General Counsel for Valencia College seeking guidance on the development of the Legal Issues Workshop to be conducted in October. There he received assurance we will be able to secure all speakers pro-bono. This will be a tremendous help to the SASFAA budget.

It is exciting serving this great organization. The President is very thankful for an outstanding team of people to help move SASFAA forward.



Southern Association of Student Financial Aid Administrators

Celena Tulloss/President Elect

Executive Board Report/July 2019

Committee Members: N/A

Goals for 2019-2020:

Review all SASFAA By-Laws, Policies and Procedures, and governing documents.

Review the Long Range Plan to ensure all issues are being or have been addressed.

Represent the President as requested, including state conference travel.

Establish all committees and have chairs in place by February 2020.

Conduct the President Elect Workshop in conjunction with the annual conference in Norfolk.

Participate in the Inter-Regional Exchange Program. (if applicable)

Establish goals for 2019-2020 year by January 1, 2020.

Participate in the NASFAA Leadership Conference.



Southern Association of Student Financial Aid Administrators

Bryan Erslan/Past-President

Executive Board Report/July 2019

Committee Members GAP – TBD

Awards Committee – The immediate past state presidents have been contacted to serve on this committee. I am awaiting their responses and confirmation.

Nominations & Election Committee –

The immediate past state presidents have been contacted to serve on this committee.

The following information was provided:

- Policies and procedures sections that govern Nominations & Election was disseminated • Deadline for nomination officers (fall board meeting)
- Membership renewal reminder was included in the notification sent to immediate past state presidents. Confirmations have been received from all nine of the previous state presidents, with one replacement Stacy Walker (MS), Nikisha Howze (SC), David Alexander(FL), April Tretter(KY), Tiffany Summers(TN), Stephanie Miller(AL), Amber Sumner(GA), Jamie Pendergrass(NC), & Joan Zanders(VA)

Committee Goals for 2019-2020:

Goal 1: GAP - Conduct Annual Assessment

Goal 2: Solicit nominations for SASFAA and NASFAA Awards

Goal 3: Solicit nominations for President-Elect, Treasurer-Elect and Secretary with a dual slate of candidates

LRP and GAP Goal Activity to date: Motion/ Action Item(s): Policy & Procedure:

Submitted membership application on 7/8/19, also encouraged committee members to pay as soon as possible or no later than September 1, 2019.



Southern Association of Student Financial Aid Administrators

Joan Bailey/Vice President

Executive Board Report/July 2019

Committee Members

The following Members are confirmed:

Felicia Ailster, GA
Bretta Carithers, GA
Amy Berrier, NC
Jonah Miller NC
April Tretter, KY
Runan Evans, KY
Jenny Cun, FL
Brenda Brown, FL
Kim Phillips, FL
Chad Sartini, VA
Brad Barnett, VA
Lane Smith, AL
James Kellam, SC
Stacy Walker, MS

Committee Goals for 2019-2020:

1. Conduct a minimum of 4 webinars, Amy Berrier will coordinate the webinar Series
2. Host the "SASFAA 2019 Symposium: Legal Issues in Higher Education" (in conjunction with fall board meeting)
 - Brenda Brown – coordinating with Brad Barnett as a sub committee member assisting
 - Expert speakers secured – Bill Mullooney and Dennis Cariello
3. Offer 2 pre-conference workshops:
 - CLOCK Hour workshop to be coordinated by Kim Phillips, this workshop will continue through the conference
 - Mid-Level Leadership workshop - coordinator TBD
4. Offer at least one NASFAA Credentialing option during the annual conference
5. Hold the New Aid Officer Workshop with a goal of 90 attendees:
 - Runan Evans will be the curriculum Coordinator
 - April Tretter will be working on a NAOW Tool kit
 - Currently 4 confirmed returning instructors – Awaiting confirmation from Katie Conrad

LRP and GAP Goal Activity to date:

In progress, selection of committee members and the planning of the first training event.

Motion/ Action Item(s):

- Recommendation of University of West Florida as the site for the 2020 NAOW
- Recommending that Fall workshop registration fee remains at \$300 per person

Policy & Procedure: Changes/ Recommendations:

NONE AT THIS TIME

Activity Summary:

Selection of Committee members of a mosaic composition reflecting the organization. Working closely with Brenda and Nathan to finalize the plans for the fall training. The plan is to open registration no later than July 31st, 2019. Discussing with Amy possible webinar topics and the timeline. Working with Kim on planning for the clock hour workshop, will be consulting with Joan Z. on this since it will be part of the conference. Currently considering someone to lean the mid-level workshop.



Southern Association of Student Financial Aid Administrators

Tarik Boyd/Secretary

Executive Board Report/July 2019

Committee Members/State Executive Board:

By-Laws committee, chaired by secretary, annually reviews By-Laws governing the Association. The By-Laws committee recommends necessary changes to the Board.

Committee members:

TBA

Committee/State Goals for 2019-2020:

Ensure that deadlines are met and the P&P is updated as needed timely.

Motion/ Action Item(s):

n/a

Policy & Procedure: Changes/ Recommendations:

n/a

General Updates: Minutes for the June Transition meeting were posted to the site on 7/8/19.



Southern Association of Student Financial Aid Administrators

Leah Louallen / Treasurer

Executive Board Report/July 2019

Committee Members

Committee Goals for 2019-2020:

- Expense claims, travel claims and other reimbursements paid upon receipt
- All bills paid upon receipt
- Deposits posted bi-weekly
- Records and accounts maintained weekly in BB&T, QuickBooks and Wild Apricot
- Payments for registrations, membership dues and sponsorships will be posted and receipted weekly
- Financial reports submitted to each Board member
- Bank accounts reconciled monthly and emailed to the Budget and Finance Chair
- Credit card reconciled and outstanding balance paid monthly
- AffiniPay deposited two times each month and reconciled at the end of the month
- Develop procedures for each Treasurer's task

LRP and GAP Goal Activity to date:

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:



Southern Association of Student Financial Aid Administrators

Marian Dill/ Budget and Finance Chair

Executive Board Report/July 2019

Committee Members

- Amy Berrier (NC) University of North Carolina – Greensboro
- Heather Boutell (TN) Vanderbilt University
- Ron Day (GA) Kennesaw State University
- Nikisha Howze (SC) York Technical College
- Heidi Hunter-Goldworthy (NC) Hunter Consulting, Inc.
- Wayne Kruger (FL) St. Petersburg College
- Lianne Masterson (NC) Blue Ridge Community College
- Brent Tener (TN) Vanderbilt University

Committee Goals for 2019-2020:

- Assist with the external audit which will be conducted by Blankenship CPA Group, PLLC
- Conduct the first quarter review of the 2019-2020 financial records
- Assist the president and treasurer with financial oversight
- Continue the consideration of various job duties of treasurer, treasurer-elect and budget & finance chair.
- Continue to review the feasibility of hiring a third-party bookkeeper
- Consider options for institutional & individual memberships

LRP and GAP Goal Activity to date:

- Development of a zero based budget occurred. President Spires, Past-president Erslan, Treasurer Louallen and Budget & Finance Chair Dill will meet in Norfolk a day prior to the first 2019-2020 board meeting to finalize the proposed budget, which will be presented to the board for their consideration.
- Review of maximum reserves

Contractual Obligations as of 7/6/19	\$260,420
Prior Year Budget	<u>\$384,848</u>
Protected Reserves (Minimum)	\$645,268
 Total Assets as of 5/22/19	 \$905,710
Discretionary Reserves (Limited)	\$260,442
 Maximum 20% for operating expenses	 \$ 52,088

Motion/ Action Item(s):

2019-2020 Budget

Policy & Procedure: Changes/ Recommendations:

None at this time

Activity Summary:

The Westin Fort Lauderdale Beach Resort – June 9-12, 2019 – Transition Board Meeting

- Total guest room night commitment is 96.
- Standard room rate is \$139. Suite rate is \$278. Currently 11% taxes. Resort fee waived.
- Overnight parking discounted from \$39 to \$25.
- Cut-off date to reserve room is May 10, 2019.
- Function space rental fee is \$0.
- All food and beverage served at Hotel must be supplied and prepared by Hotel. Group will spend a minimum of \$5,000.
- Must advise Hotel of expected method of payment by June 9, 2019.

Total liability: \$17,385

Hilton Norfolk the Main – Norfolk, VA – February 7-12, 2020 – Conference

- Room rate is \$159 single or double occupancy. For triple and quadruple occupancy there is a \$20 additional charge per adult per room per night with maximum occupancy of four persons per room
 - Attrition @ 85% of the total room nights. Attrition amounts will be offset by revenue received for noshows and individual cancellation fees. All rooms booked outside of the block will be credited to the group block and applied to any attrition performance.
 - Cut-off date is January 8, 2020.
 - Guestroom cancellation – no penalty will result if notice is received at least 72 hours prior to arrival and a cancellation number is obtained. If the reservation is not cancelled by this time, one night room and tax deposit is forfeited.
 - Check-in time is 4 pm. Check-out time is 11 am. Rooms vacated prior to reservation will result in early departure fee of one night's room and tax.
 - A minimum of \$50,000 in food and beverage revenue from group-sponsored functions at Hotel is required in connection with the event.
 - Must notify Hotel of the exact number of attendees for each outlined function by noon three business days prior to the event.
 - Hotel requires that only food and beverage purchased from Hotel be served on Hotel property. In addition, no food or beverage, including alcoholic beverages, can leave the property if it has been prepared specifically for on-property, private functions. Under no circumstances may liquor be brought in from outside Hotel or served by anyone other than a designated Hotel representative.
 - Hotel will provide, at no charge, a reasonable amount of meeting equipment (chairs, tables, cloths, podiums, etc.)
 - A Master Account will be created for billing purposes.
 - If direct bill not approved, Hotel required 50% of the entire estimated amount of guestroom and catering charges 30 days prior to arrival. Remaining balance will be due 3 business days prior to arrival.
 - There is a parking deck attached to the Hotel. Self-parking for overnight guests is \$16 per car per night. Valet parking for overnight guests is available at the rate of \$26 per car.
 - Banners, posters, props and similar decorations may not be adhered to walls, ceilings, windows, doors or floors, without the express written consent of Hotel and supervision of Hotel's staff. There is a \$50 labor charge for hanging each banner or sign.
 - A non-refundable deposit of \$500 is due within 60 days of execution of this agreement.
- Will be provided with the following concessions:
- 1-40 comp on a cumulative basis
 - 3 suite upgrades at the group rate

- 1 comp Presidential Suite
- 1 comp hospitality suite
- \$10 rebate that can be credited toward the master account
- 10 rooms at prevailing per diem
- 10% off AV pricing
- 8 deluxe kings at the group rate
- Complimentary meeting space
- Complimentary six foot exhibit tables up to 30
- There is a one-time fee of \$25 for power per table if needed
- Complimentary wireless internet in the guestrooms and meeting space
- Discounted self-parking for in and out privileges – was \$20 charging \$16
- Complimentary room rental for pre-planning board meeting. Sleeping rooms to be offered at the conference rate.
- Hilton Honors Meeting Planning Points will be awarded at the conclusion of the event for room revenue and Food and Beverage
- 75,000 Point Signing Bonus
- 3 round trip VIP airport transfers
- One hour complimentary beer and wine reception hosted by the Hotel
- 5% off banquet menus

Total liability February 6-August 6, 2019: \$99,332

Norfolk Waterside Marriott – Norfolk, VA – February 9-12, 2020 – Conference Overflow

- 330 room nights
- Rate is \$159 and includes a \$10 rebate to the master account for each paid room night.
- Cut-off date is January 19, 2020.
- Attrition is 75%.

Total liability February 8-June 8, 2019: \$30,237.90

Spirit Cruises Norfolk – Norfolk, VA – February 11, 2020 – Dinner Cruise

- \$47 per person for 250 people

Total liability until November 13, 2019: \$2,937.33.

Hilton Norfolk the Main – Norfolk, VA – July 12-15, 2019 – Board Meeting/Conference Pre-Planning

- 70 room nights
- Rate is \$159 plus 15.5% plus \$3
- \$20 per person per room if over 4 adults
- Cut-off date is June 14, 2019
- Complimentary meeting room
- F&B minimum \$800
- Complimentary Wifi in sleeping rooms

Total liability: \$11,930

Renaissance Montgomery Hotel & Spa at the Convention Center – Montgomery, AL – February 19-24, 2021 – Conference

- Room rate is \$159 plus 15% plus \$2.25
- 1,095 contracted room nights
- \$10 rebate per room, per night will be credited to the master account
- \$65,000 F&B minimum
- Waived room rental for all hotel space with \$65,000 F&B minimum

- Complimentary Presidential Suite over conference dates
- Complimentary Governor's Suite over conference dates
- 10 Executive Suite upgrades for VIPs
- 10 Concierge Level passes for VIPs
- 1/40 comp room ratio
- Complimentary Wifi in guest rooms
- Waived fees for shipping/receiving of packages (up to 25)
- Hotel will sponsor the Saturday morning board breakfast (30 max)
- VIP amenities will be delivered to 10 designated VIPs
- Double Marriott Reward Points for planner
- 21 day cut off
- Attrition at 75%
- Group rate available 3 days pre/post based on availability
- 10% discount on spa services for all attendees
- \$3.00 discount off self-parking
- Cut-Off date is January 25, 2021

Total liability until February 17, 2020: \$71,731.50

Renaissance Charlotte Suites – Charlotte, NC – October 4-9, 2019 – Fall Meeting

- Room rate is \$145 plus 15.25%
 - 118 contracted room nights
 - Complimentary parking
 - 1 complimentary upgrade to Executive King Suite, at group rate
 - 1/40 comp room policy (cumulative)
 - Complimentary meeting room Wifi
 - Double Marriott Bonvoy Points
 - Cut-off date is September 16, 2019
 - Attrition at 80%
 - \$4,500 F&B minimum

Total liability: \$18,188

Hilton Myrtle Beach Resort – Myrtle Beach, SC – June 7 – 10, 2020

- Room rate is \$149 plus 12%
- 31 contracted room nights
- Complimentary parking
- 1 complimentary upgrade to Executive King Suite, at group rate
- 2 comp rooms if blocked filled
- Complimentary meeting room Wifi
- Event Planner – Celena Tullos will qualify for Hilton Honors Points
- Cut-off date is May 8, 2020
- Attrition at 90%
- \$3,500 F&B minimum

Total liability: \$8,678.50

Total liability: \$260,420.23

Charles Schwab Investments: NASFAA:

Month/Year	Cash	Bond Cost Basis	Equity Cost Basis	Total	Difference	Dividends or Capital Gain/Loss	Management Fee	Cumulative Earnings by Year
July 2018	\$40,007.61	\$88,822.51	\$197,600.37	\$326,430.49	\$515.19			\$13,253.40
August 2018	\$39,596.08	\$88,902.19	\$198,292.38	\$326,790.65	\$360.16	\$323.87	\$419.00	\$13,613.56
September 2018	\$39,745.72	\$88,981.07	\$198,974.06	\$327,700.85	\$910.20			\$14,523.76
October 2018	\$35,107.42	\$119,525.06	\$177,267.40	\$331,899.88	\$4,199.03	\$3,684.77	\$0.00	\$18,722.79
November 2018	\$34,717.81	\$119,604.68	\$177,460.79	\$331,783.28	-\$116.60		\$424.00	\$18,606.19
December 2018	\$34,843.24	\$119,978.64	\$182,214.84	\$337,036.72	\$5,253.44			\$23,859.63
January 2019	\$34,852.57	\$119,978.64	\$182,426.85	\$337,258.06	\$221.34			\$24,080.97
February 2019	\$34,862.34	\$120,065.53	\$182,622.15	\$337,550.02	\$291.96			\$24,372.93
March 2019	\$34,527.81	\$120,299.63	\$182,835.44	\$337,662.88	\$112.86		\$396.00	\$24,485.79
April 2019	\$34,484.78	\$120,434.28	\$183,053.56	\$337,972.62	\$309.74			\$24,795.53

Edward Jones Advisory Solutions:

Month/Year	Ending Value	Change in Value	Investment or Withdrawal	Income	Advisory Solutions Program Fee	Cumulative Income (Income-Fees)	Cumulative Change in Value	Cumulative Investment	Balance Sheet
July 2018	\$420,347.04	\$3,288.94	\$0.00	\$807.27	\$480.61	\$43,218.55	\$18,164.68	\$373,013.52	\$416,232.07
August 2018	\$422,619.11	\$2,771.06	\$0.00	\$776.77	\$498.99	\$43,496.33	\$20,935.74	\$373,013.52	\$416,509.85
September 2018	\$420,944.13	-\$1,174.15	\$0.00	\$984.09	\$500.83	\$43,979.59	\$19,761.59	\$373,013.52	\$416,993.11
October 2018	\$411,047.93	-\$9,412.10	\$0.00	\$883.77	\$484.10	\$44,379.26	\$10,349.49	\$373,013.52	\$417,392.78
November 2018	\$413,151.31	\$2,596.20	\$0.00	\$969.34	\$492.82	\$44,855.78	\$12,945.69	\$373,013.52	\$417,869.30
December 2018	\$410,224.31	-\$2,453.03	\$0.00	\$5,313.12	\$473.97	\$49,694.93	\$10,492.66	\$373,013.52	\$422,708.45
January 2019	\$417,230.11	\$7,493.26	\$0.00	\$548.92	\$487.46	\$49,756.39	\$17,985.92	\$373,013.52	\$422,769.91
February 2019	\$423,827.45	\$7,091.18	\$0.00	\$911.30	\$493.84	\$50,173.85	\$25,077.10	\$373,013.52	\$423,187.37
March 2019	\$429,349.05	\$5,974.31	\$0.00	\$1,189.52	\$452.71	\$50,910.66	\$31,051.41	\$373,013.52	\$423,924.18
April 2019	\$432,169.69	\$3,326.83	\$16.45	\$900.86	\$506.19	\$51,305.33	\$34,378.24	\$373,029.97	\$424,335.30

SASFAA, Inc.

BALANCE SHEET

As of June 30, 2019

	TOTAL
▼ ASSETS	
▼ Current Assets	
▼ Bank Accounts	
BB&T Checking	92,732.22
BB&T Savings	47,897.21
Edward Jones-Money Market	2,773.53
Total Bank Accounts	\$143,402.96
▼ Other Current Assets	
Advisory Solutions 20/80 @ Edward Jones	424,335.30
Charles Schwab (NASFAA)	337,972.62
Total Other Current Assets	\$762,307.92
Total Current Assets	\$905,710.88
TOTAL ASSETS	\$905,710.88
▼ LIABILITIES AND EQUITY	
Liabilities	
Total Liabilities	
▼ Equity	
Opening Balance Equity	757,980.87
Retained Earnings	90,660.19
Net Income	57,069.82
Total Equity	\$905,710.88
TOTAL LIABILITIES AND EQUITY	\$905,710.88

Accrual basis Wednesday, May 22, 2019 11:01 AM GMT-04:00



Southern Association of Student Financial Aid Administrators

Joan A. Zanders/Conference 2020 Chair

Executive Board Report/July 2019

Committee Members:

Bill Spiers, Celina Tulloss, Joan Bailey, Leah Louallen, Michael Birchett, Nathan Basford, Stacy Walker, Jonah Miller, Tarik Boyd, Erica Robinson, Kathy Suarez, Kimberly Morris, Mark Anthony Messingschlager, Robert Muhammad, Scott Callahan, Reed W. Allison, Kendra Allen and Nichele Inboden

Committee Goals for 2019-2020:

- Provide conference sessions that meet the needs of SASFAA's diverse school types and member responsibilities
- Provide sessions that:
 - Assist members in maintaining compliance,
 - Provide opportunities to share best practices and differing viewpoints,
 - Provide opportunities for personal and professional growth
- Provide time during the conference for networking, fellowship and relaxation
- No one leaves without a sense of impact and growth.
- Stay within budget
- Utilize as many room nights as possible to prevent penalties

LRP and GAP Goal Activity to date:

Motion/ Action Item(s):

Conference contract with Robert Weinerman

Policy & Procedure: Changes/ Recommendations:

Activity Summary: Our first SASFAA Conference 2020 Committee Meeting will be Sunday, July 14, at Norfolk Hilton The Main. The conference theme is "Courage, Compassion, Collegiality: A Survivor's Guide for Uncharted Waters", and our charity selection is tentatively The Free Network, a 501©3 coalition headquartered in Clearwater/Tampa Bay. Through education, awareness, advocacy, victim services, resource development, community action and prevention, The Free Network helps stop human trafficking and protects hundreds of human trafficking victims.



Southern Association of Student Financial Aid Administrators

Michael Birchett, Sponsorship Chair

Executive Board Report/July 2019



Southern Association of Student Financial Aid Administrators

Sarah Dowd

Communications and Outreach

Executive Board Report/July 2019



Southern Association of Student Financial Aid Administrators

Jonah Miller / Electronic Services Committee Chair

Executive Board Report/July 2019

Committee Members

- Chad Sartini – Wise Guru to help with all things since he is Chad ☺
- Celena Tulloss – Webinars, etc etc. AKA Second Guru
- Zachary Christian – SASFAA Webpage / Wild Apricot
- Jennifer Coffey – Guidebook / Conference
- April Tretter – Guidebook / Conference
- David Alexander –
- Daniel Barkowitz –
- Ashley Edens –

Committee Goals for 2019-2020:

- Ensure the website stays accurate and up-to-date
- Ensure that SASFAA events are open to the membership and communicated in a timely manner
- Review current webpage for improvements / tweaks as needed (maybe reorganize a little)

LRP and GAP Goal Activity to date:

- LRP and GAP review in progress. Will provide an update as it relates to Electronic Services at the Fall Board Meeting

Motion/ Action Item(s):

- N/A
-

Policy & Procedure: Changes/ Recommendations:

- N/A at this time. Maybe later.

Activity Summary:

- Forms updated on the SASAA webpage with the new Treasurer information.
- Worked with Wayne and Chad at the transition meeting to setup the Membership application auto-renewal. Those notices went out on July 8th.
- Created the landing page for the 2019-2020 Executive Board (not currently visible). Working with Sarah to get that fleshed out.

Posted the June 2019 Transition Meeting minutes to the webpage per Tarik's request.



Southern Association of Student Financial Aid Administrators

Ron Gambill, Chair, Legislative Relations Committee

Executive Board Report/July 2019

Committee Members/State Executive Board:

AL	Stephanie Miller	Financial Aid Solutions
FL	Kimberly Lent	University of South Florida (FCAN)
GA	Nancy Ferguson	University of Georgia
KY	Rhonda Bryant	University of Kentucky
MS	LaShanda Chamberlain	Mississippi Gulf Coast Community College
NC	Bridget Ellis	ECMC
SC	Joey Derrick	University of South Carolina
TN	Ron Gambill	Edsouth (Chair)
VA	Brad Barnett	James Madison University (State)
	Will Schaffner	MOHELA (Federal)

Volunteers:

Melinda Clark	St. Leo University	FL
Chesa Donovan	Global Financial Aid Services	MS
Heidi Hunter-Goldsworthy	Hunter Consulting	NC

Committee/State Goals for 2019-2020

- Provide weekly updates for Congress when in session and other D.C. related activities impacting higher education.
- Review relevant NPRMs and Congressional legislation as appropriate for comment.
- Conduct a DC Hill visit with appropriate proposals for the HEA Reauthorization in the Spring of 2020.
- Provide a legislative webinar on Reauthorization, or legislative advocacy.
- Develop a committee listserve and establish conference calls for committee communications.
- Have a committee member designated by the State President of each SASFAA state.

Motion/ Action Item(s):

None

Policy & Procedure: Changes/ Recommendations:

Changes to Monthly Activities Legislative Relations

A. Delete all references in monthly activities:

- 1) Gather information from agencies to be included in board report.
(Reference to the 9 State Guarantee Agencies which no longer have that function.) July, November, February, June.
- 2) Mail information concerning the regulatory process to the summer new aid officer workshop participants in August. (This has not been the practice in years as regulations are incorporated into the curriculum.)

- B. Get on NCHELP Daily Briefing Listserv
(Change NCHELP to NCHER) July

P & P Manual (Page 33)

- (2) Appoint committee members representing each member state working with State Presidents. Seek to include representation from all sectors and institutional types, as well as representatives from relevant organizations.
- (6) Assist the conference committee in planning interest sessions for the annual conference on legislative or regulatory issues including those affecting state grant or support agencies.
- (7) (DELETE)
- (8) (DELETE)
- (9) Use the SASFAA listserve to inform members of legislative and regulatory activities.
- (10) (DELETE)
- (13) Inform SASFAA members of any federal legislative and/or regulatory issues impacting state grant agencies, state or private non-profit organizations providing financial assistance to students in the SASFAA region.

General Updates:

The House passed H.R. 2740, the Labor, Health and Human Services (HHS), Education, and Related Agencies Appropriations Act for Fiscal Year 2020 recently. The bill would provide \$75.9 billion in discretionary funding for the U.S.D.E., including a \$150 increase in the maximum Pell Grant and significant increases in FSEOG, FWS, TRIO and GEAR UP.

The Senate Appropriations Committee is not expected to come forward with a recommendation until after the 4th of July recess.

Another interesting bill coming out of the House is H.R. 3334 which would allow remaining undergraduate Pell Grant eligibility to be used toward a first graduate degree. Representative Tim Burchett from Tennessee was one of the sponsors.

House Bill H.R.3353, the Parent Plus Loan Improvement Act, would allow parents with PLUS loans to enroll in income contingent and income-based repayment plans. It would also reduce the current interest rates and eliminate origination fees on PLUS loans.

An announcement was made that the College For All Act would be introduced by Senator Bernie Sanders, Representative Pramila Jayapal and Representative Ilhan Omar. The bill would forgive all federal and private loan debt for 45 million Americans totaling \$1.6 trillion and eliminate tuition and fees at public four-year colleges and universities, community colleges, trade schools, and apprenticeship programs. Sanders' proposal would also cap the interest rate on all new federal student loans at 1.88%, triple the funding for FWS, double the funding for TRIO and increasing funding for GEAR UP. The proposal would be paid for by imposing a new tax on Wall Street transactions, including stock trades, bonds, and derivatives. The cost of this proposal in Sanders' higher education plan is \$2.2 trillion.

On June 26, 2019, The House Energy and Commerce Subcommittee on Communications and Technology met in executive session to consider H.R. 3375, the Stopping Bad Robocalls Act. It passed the subcommittee by a voice vote and goes to the full committee for consideration. The focus of the bill is to crack down on abusive and illegal robocalls to consumers.

The day before, June 25, the FTC announced that it had teamed up with 25 law enforcement groups and filed 94 actions against organizations responsible for more than one billion illegal robocalls

USDE Update

The new interest rates for the 2019 – 2020 academic year went into effect July 1, 2019. Undergraduates will pay 4.53%, graduate students will pay 6.08%, and Parent PLUS and Grad PLUS borrowers will pay 7.08%. These rates have no impact on private loans or existing federal fixed rate student loans. Origination fees will probably change October 1, 2019, as they are on a federal fiscal year schedule, not academic year.



Southern Association of Student Financial Aid Administrators

Wayne Kruger/Membership Chair

Executive Board Report/July 2019

Committee Members: None at this time

Committee Goals for 2019-2020:

- 1) Review membership area of the By-laws and Policies and Procedures reviewed for accuracy, completeness, clarity.
- 2) Have an organized membership drive to increase membership.
- 3) Provide timely and pertinent information to the membership.
- 4) Educate the membership on the cost of conferences and training events.
- 5) Work with the B&F committee to put together recommendations for changes to the bylaws and P&P on membership to offer institutional membership and/or prepaid from one year to the next membership.

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: I have updated all the membership emails in wild apricot as well as sent out a membership reminder email with instructions on the auto-renew process. I have begun to review and update duplicate records in the system and have been responding to membership emails and questions about the process. Have begun working with the treasurer to make sure accounts are update correctly and have joined the B&F committee to work on recommendation for changes to P&P and Bylaws with regards to membership.



Southern Association of Student Financial Aid Administrators
Nathan R. Basford, Jr./Site Selection chair
Executive Board Report/July 2019

Committee Members:

I sent an email out to the current State Presidents on June 17, 2019 and a follow up on July 5, 2019. As to date I have the following members for the site selection committee:

Florida: Irma Molinares	Mississippi: Nicole Patrick	North Carolina: <i>TBD</i>
Georgia: Tarik Boyd	Alabama: <i>TBD</i>	South Carolina: <i>TBD</i>
Kentucky: Michael Birchett	Tennessee: <i>TBD</i>	Virginia: <i>TBD</i>

Committee Goals for 2019-2020:

1. Assemble a site selection committee: I am still working to have a complete committee, based on the Policy & Procedure information from 6:15, which says the committee should have a representative from each state that has had experience working in this position within their state.
2. Will visit viable sites and evaluate them using the SASFAA site facility guidelines and hotel checklist along with President, President-elect and VP of training per their recommendations.
3. Provide updates to the board on possible contracts for future conferences and training.
4. Will secure final contracts for the President's signature once submitted to the executive board for discussion and approval.
5. Work with hotel contact to make arrangements for board meetings, room arrangements, and meals and meeting rooms.
6. work closely with conference chair in the preparation of the annual conference:

LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

1. Worked with Michael in finalizing this meeting, and introduced myself to the hotel contact persons for this meeting as well as working with the hotel for our October board meeting and workshop.
2. Working with Celena, Joan and Brenda on future meetings and trainings.

It's going to be a great year, and I look forward to serving in this position as well as working with other committees on their assigned task.



Southern Association of Student Financial Aid Administrators

Stacy Walker/Global Issues

Executive Board Report/July 2019

Committee Members

Only some members confirmed at the time of report writing so will provide a full list as a separate document at the next meeting.

Committee Goals for 2019-2020:

1. Seek representation and inclusion of each state on the Global Issues Committee.
2. Promote diversity and inclusiveness in the association by ensuring make up of committees are representative of the diversity of the organization.
3. Ensure the association is provide training and information for all sectors that we serve.
4. Provide articles for the SASFAA Nine news – intention is to provide at least one article per month starting August 2019 addressing timely and relevant information.
5. Work with the membership committee to explore the possibility of utilizing the experienced members as a means to support upcoming young professionals by providing helpful resources and a support system.
6. Continue to bring attention to the available resources for specific categories of students such as but not limited to DACA, homeless, hungry students.
7. Propose and/or seek members to propose at least 4 diversity related sessions for the annual conference

LRP and GAP Goal Activity to date:

none

Motion/ Action Item(s):

No Motions at this time, Worked on soliciting members to serve on this committee. I hope to have finalize the members by the board meeting. Meetings will be conducted via phone. First meeting will be held in August. Will be working closely with conference committee to accommodate sessions at our annual conference.

Policy & Procedure: Changes/ Recommendations:

Activity Summary:



Southern Association of Student Financial Aid Administrators

Sandy Neel/ LRP

Executive Board Report/July 2019



Southern Association of Student Financial Aid Administrators

Steve D. Smith, Alabama President

Executive Board Report/July 2019

AASFAA Board Members

- Members of the board were selected from a list of volunteers with diversity and inclusion in mind. All necessary positions, chairs, and committees were filled.

Appointees

- SASFAA Conference Committee, Charmaine Truelove
- SASFAA Site Selection Committee, Erica Robinson
- SASFAA Legislative Committee, Stephanie Miller

AASFAA Goals for 2019-2020:

Mission Statement:

AASFAA's mission is to provide an association which promotes the professional growth and collaboration of its members, and address the needs of students, families, and institutions in matters related to financial and information resources.

Theme:

"Celebrating a Bright Future in Financial Aid"

Goals:

- Ensure that diversity and inclusion is central to selection of board members.
- Provide training opportunities throughout the year
- Provide professional development opportunities
- Deliver an outstanding annual conference with learning opportunities for members of many different experience levels
- Successfully launch a new website
- Increase support from vendors/sponsors
- Replace banners
- Adopt Roberta's Rules of Order as our standard
-

LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

AASFAA held our annual Board Transition meeting on July 1, 2019 at Faulkner University in Montgomery, AL. The event was attended by both outgoing and incoming Board Members.

Old business was completed or passed on to the new Board after a review of reports from the outgoing Board. The incoming Board members discussed new business, set goals, adopted a new budget and began preparation for our Fall Training Conference which will be held at Auburn University Montgomery on October 4, 2019.



Southern Association of Student Financial Aid Administrators

Daniel T. Barkowitz, Florida President

Executive Board Report/July 2019

FASFAA Executive Board Members (V indicates voting member)

- President, Daniel Barkowitz, Valencia College (V)
- President-Elect & Nominations, Dameion Lovett, University of South Florida (V)
- Immediate Past President & Fiscal Concerns, David Alexander, Universal Technical Institute (V)
- Vice President of Training, Nadine Bailey, Ultimate Medical Academy (V)
- Secretary, Jenny Cun, University of South Florida (V)
- Treasurer, Katie Conrad, Florida International University (V)
- Treasurer-Elect, Eileen Brzozowski, Eastern Florida State College (V)
- Region I Representative, Shana Gore, University of West Florida (V)
- Region II Representative, Nichole Crowley, Keiser University (V)
- Region III Representative, Abigail Troche, University of Central Florida (V)
- Region IV Representative, Kylie Gross, University of Tampa (V)
- Region V Representative, Jessica Herrera, Florida International University (V)
- Conference Chair / Member at Large, Karemah Mansalle, University of Central Florida (V)
- Federal and State Legislative Chair / Member at Large, Kimberly Lent, Florida College Access Network (V)
- Global Issues / Member at Large, Trey Harrison, DeVry (V)
- Vendor/Sponsorship Coordinator / Member at Large, Laura Dickerson, Sallie Mae (V)
- Site Selection/Event Coordinator / Member at Large, Jeff Daniels, PNC Bank (V)
- OSFA Liaison, Louanne Standley, FLDOE, OSFA
- Volunteer Coordinator, Kamia Mwango, Santa Fe College
- Electronic Services, Jerry McMahon, Keiser University
- Communication / Outreach / Special Initiatives, Vanesa Alfaro, Florida Career College
- Financial Literacy / Early Awareness, Ilia Cordero, Valencia College
- Newsletter, Chansone Durden, Earnest
- Membership Chair (Local Arrangements), Suzanne Evans, St. Johns River State College
- Scholarship / Charity Chair, Merrian King, St. Petersburg College
- 25+ Year Member Liaison / Leadership Development, Donna Kolb, University of Florida
- Webinars, Wayne Kruger, St. Petersburg College
- Private College (For Profit / Not-for-Profit) Liaison, Kevin McCrary, Bethune Cookman
- Graduate/Professional, Sandy Shimp, Ave Maria University
- Vocational -Technical / Clock Hour, Teriann Wright, Orange County Public Schools
- Bookkeeper, Gwyn Francis, FASFAA

Appointees

- SASFAA Conference Committee, Kathy Suarez, Valencia College
- SASFAA Site Selection Committee, Irma Molinares, ECMC

FASFAA Goals for 2019-2020:

Mission Statement:

“When an association values differences and creates a welcoming environment – one that is comfortable, inclusive, and empowering – it opens the door for innovation, increased participation and an elevated sense of community and belonging for all.”

-- from <https://www.associationforum.org/browse/welcomingenvironment>

Theme:

“Help FASFAA Open the Door”

Goals:

FASFAA Leadership Goals for 2019-20

In 2019-20, we will Help Open the Door to FASFAA to:

- Our Members
 - ***Sample Goals (Final Goals are under development):***
 - By ensuring that every committee in our association’s governance includes multiple volunteers from the association (unless prevented by policy or procedure)
 - By providing training opportunities throughout the year that are local, free, and available (including regional workshop and webinars)
 - By providing professional development opportunities for all of our members regardless of their experience (New Aid Officer, Leadership Development, etc)
 - By delivering an exceptional annual conference with learning opportunities for members of many different experience levels
 - By informing our members through newsletters, emails, legislative advocacy outreach, and other ways of information pertinent to their jobs in a timely manner
- Our Students and Parents
 - ***Sample Goals (Final Goals are under development):***
 - By establishing a relationship with OSFA and our local area high schools to support FAFSA awareness and completion events
 - By working with FCAN and the LCANs in partnership to encourage financial aid awareness for our families
 - By providing scholarships through the Bonnie Pirkle program to deserving students and sharing the recipients stories at our annual conference.
- Our Colleagues in Other Departments
 - ***Sample Goals (Final Goals are under development):***
 - By offering sessions at our regional workshops and annual conference which provide opportunities for shared learning
 - By considering the development of a high school counselor educational curriculum with “Beyond the FAFSA” content
- Our Sponsors / Vendors (also members) who support our work
 - ***Sample Goals (Final Goals are under development):***

- By ensuring that the concerns of our partners are considered in the planning of our annual conference
 - By providing opportunities and rewarding meaningful conversation with the exhibitors at the conference
 - By working to ensure that the decision-makers are in the room at the FAFSA conference.
 - By working to prevent overlap with GASFAA for future years (2021 and after) by either coordinating our schedules or looking to move our conference to the Fall.
- Our Colleagues who are Not Yet Members
 - ***Sample Goals (Final Goals are under development):***
 - By reaching out to schools who are not yet members to invite them to be a part of FASFAA
 - By working on outreach communication from both FASFAA leadership and from higher education leadership in Florida
 - By examining our membership model (individual vs. institutional)

LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

FASFAA held our annual Board Transition meeting from June 22-24, 2019 at the Embassy Suites, Lake Street, Orlando, FL. The event was well attended by both outgoing and incoming Board Members. Past president Alexander oversaw a successful final 2018-19 Board meeting in which a rewritten Policy and Procedures document for FASFAA was reviewed and approved, a nearly final P&L for FY2019 was reviewed, and accomplishments of the Board were celebrated.

President Barkowitz welcomed the 2019-20 Board Members to the table on Sunday, June 23, and the combined Board began with a reading about liminal spaces (spaces in transition). The two boards next participated in a discussion and exercise summarizing FASFAA's Value Proposition for membership (see below for an outcome graphic describing our work). The new and old Board next met in transition planning groups to discuss 4 questions (what was your greatest success last year, what was your biggest regret, what support did you need that you didn't receive, and what advice do you wish you had been given when you started your role?).



Southern Association of Student Financial Aid Administrators

Lakisha Sanders, GASFAA President

Executive Board Report/July 2019

GASFAA Executive Board Members (V indicates voting member)

- President, Lakisha Sanders, Clayton State University (V)
- President-Elect, Maria Hammett, Mercer University (V)
- Past President, Amber Singletary, Universal Technical Institute (V)
- Vice President of Professional Development, Angela Tate, Lanier Technical College (V)
- Secretary, Syreeta Monroe, Savannah State University (V)
- Treasurer, Kristie Teasley, Chattahoochee Technical College (V)
- Treasurer-Elect, Jill Towns, Georgia Military College
- Program Chair, Wil Humphries, University of West Georgia
- Budget and Finance Chair, Pennie Strong, Georgia Student Finance Commission
- Technology Chair, David McMillion, Piedmont College
- Diversity Chair, Billy Evans, Clayton State University
- Legislative Affairs Chair, Nancy Ferguson, University of Georgia
- Communications and Community Action Chair, David Haygood, Sallie Mae
- Membership Development Chair, Susan Smith, University of North Georgia
- Leadership and Mentorship Chair, Felicia Ailster, Georgia State University
- Software Programs Chair, Dustin McDaniel, Athens Technical College

Committee/State Goals for 2019-2020:

Strategic Goal 1: Expand the GASFAA member's influence beyond their institution with the creation of the mentor and mentee program to develop talented leaders and foster an environment to encourage co-presenters to build their confidence. A mentor will establish a relationship to help someone know they are not alone. The GASFAA community can volunteer to be a mentee regardless of how many years of experience in financial aid.

Strategic Goal 2: Continue to address the GASFAA community training needs and providing best practices. This will be guided through the GASFAA community feedback.

Strategic Goal 3: Develop leaders to participate in the GASFAA Executive Board through the identification of committee members that show stewardship to others and a drive to participate and serve in meetings.

LRP and GAP Goal Activity to date:

None

Motion/ Action Item(s):

None

Policy & Procedure: Changes/ Recommendations:

None

Activity Summary:

GASFAA started the Board Transition meeting July 8, 2019 and it continues Tuesday July 9, 2019 at the Hilton Northeast, Peachtree Corners, Georgia. This meeting was attended by the 2018-2019 and 2019-2020 board members with successful activities to transition the board members and honestly speak of things that were challenges, solutions to these challenges, and successes to prepare the 2019-2020 board. The 2018-2019 board was dismissed.

The theme for 2019-2020 is Enhance Your Learning. Pass It Forward. Make A Difference. This theme connects to our strategic goals.

Today's tour of the hotel conference rooms for the 2020 conference was successful and allowed us to secure more training rooms on-site today for the first conference day. We were able to get the hotel conference room layout documentation and the Program Chair started the work to plan for the conference today.



Southern Association of Student Financial Aid Administrators

Bob Fultz/Kentucky President

Executive Board Report/July 2019

Committee Members/State Executive Board:

Kentucky (KASFAA) Executive Board

President	Bob Fultz	4 Year Private
President-Elect	Michelle Standridge	4 Year Private
Past-President	April Tretter	4 Year Private
Vice President of Training	Rhonda Bryant	4 Year Public
Treasurer	Mark Messingschlager	4 Year Private
Secretary	Brooke Gupton	4 Year Private
Four-Year Public Schools	Toya Bailey	4 Year Public
Two-Year Public Schools	Michael Barlow	2 Year Public
Proprietary Schools	Joni Penland	Proprietary
Private Schools	Robyn Solberger	4 Year Private
Non-School	Biz Daniel	Non-School

Kentucky (KASFAA) Committee Chairs

Archivist/Historian	Brittini Wise	4 Year Public
Articles and Bylaws (Secretary)	Brooke Gupton	4 Year Private
Awards	Charles Vinson	4 Year Public
Budget and Finance	Kevin Lamb	4 Year Private
Communications/Outreach	Brittini Wise	4 Year Public
Diversity Concerns	Vickie Montgomery	4 Year Private
Legislative Issues	Erin Klarer	Non-School
Long Range Planning	Kristie Hughes	4 Year Public
Membership	Janet Jones	4 Year Public
Nominations	April Tretter	4 Year Private
Fall Program	Terri Jo Thomas	4 Year Public
Spring Program Co-Chair	Beth Mitchell	4 Year Private
Spring Program Co-Chair	Michelle Standridge	4 Year Private
Site Selection	Chester Priest	Non-School
Training (HS Counselor) 1	Beth Mekus	4 Year Public
Training (HS Counselor) 2	Angela Miller	Proprietary

Training-New Aid/Support Staff
Vendor/Sponsor
Website/Technology

Felecia Proctor
Sandy Neel
Michael Birchett

4 Year Public
4 Year Public
2 Year Public

Committee/State Goals for 2019-2020:

Develop a Vendor Sponsor Relations Handbook

Develop a Conference Handbook working with April Tretter's Goal as this was a goal for her during the 2018-2019 year.

Work with committee chair to identify future leader/chairs for KASFAA.

Provide two conferences, one in the Fall (October) and in the Spring (April) with NASFAA U credential classes and training sessions for all levels for financial administrators.

Provide additional one-day training sessions during the year.

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activities:

Since the June transition and board meeting, President Bob Fultz has finalized the committees for the 2019-2020 year. Bob Fultz attended the SASFAA final board meeting for the 2018-2019 year as an observer, and attended the SASFAA transition meeting on June 10-11 in Fort Lauderdale, Florida. President Bob Fultz also attended the NASFAA the conference held in Orlando Florida at the Walt Disney Swan and Dolphin Resort on June 24-27, 2019. Bob Fultz while attending the NASFAA conference attended the state president's luncheon on June 25. Bob Fultz also appointed Mark Messingschlager to represent Kentucky on the SASFAA 2019-2020 conference committee.



Southern Association of Student Financial Aid Administrators

Gail Muse Beggs/MASFAA President

Executive Board Report/July 2019



Southern Association of Student Financial Aid Administrators

Robert Muhammad, Florida President

Executive Board Report/July 2019

Committee Members

NCASFAA 2019-20 Executive Board

<u>Position</u>	<u>First Name</u>	<u>Last Name</u>	<u>Organization</u>
President	Robert	Muhammad	Winston-Salem State University
President-Elect	Kamesia	House	Fayetteville State University
Past-President	Jamie	Pendergrass	North Carolina State University
Vice-President	Kendra	Myers	Surry Community College
Treasurer	Zilma	Lopes	Central Carolina Community College
Treasurer Elect	Vacant	Vacant	Catawba Valley Community College
Secretary	Precious	Ward	Central Carolina Community College
Budget and Finance Chair	Ben	Carmichael	Winston-Salem State University
Fall Program Chair	Amy	Berrier	UNC Greensboro
Spring Program Chair	Sherlock	McDougald	Edgecombe Community College
Diversity/Global Issues Co-Chair	Francisco	Parrilla	North Carolina State University
Diversity/Global Issues Co-Chair	Fred	Holding	UNC Wilmington
Legislative Advisory Chair	Bridget	Ellis	ECMC
Membership Chair	Kyle	McMahan	North Carolina State University

Professional Advancement-New Aid Officers Chair	Monty	Hickman	North Carolina Community Colleges System Office
Professional Advancement - Intermediate Aid Officers Chair	Kali	Brown	Vance Granville Community College
Professional Affiliates Chair	Biz	Daniel	Great Lakes Educational Loan Services
Publicity and Publications Chair	Dan	Sanchez	UNC Wilmington
Site Selection-Chair	Rod	Walton	PNC Bank
State and High School Relations Chair	Leslie	Lloyd	Craven Community College
State Agency Liaison Chair	Kevin	Lineberry	North Carolina State Education Assistance Authority
Technology Task Force Chair	JD	Gibbs	Lenoir Community College
Prof Advancement - North Carolina Training Webinars Chair	Michelle	Hemmer	William Peace University
Ad-hoc Committees			
Council of Past Presidents	Paul	Coscia	Salem College
Minority Serving Institutions Conference	Sherri	Avent	North Carolina A&T Stat University
Analytics Committee	Wanda	White	North Carolina Community Colleges System
Committee to Include Training Tracks - Director and Strategic Enrollment Management	Mary	Otto	Campbell University
Taskforce on Fraud	Mike	O'Grady	MOHELA

Theme for 2019-20

Our profession is one of access. We provide access to students – so that they may have an opportunity to attend college. Access to our campus colleagues – so that they may gain an understanding of the importance of financial aid. We help them to understand the “why’s” of the “do’s,” don’ts,” and umm...”no ways” of our alphabet soup,

which is generously seasoned with regulations, policies, procedures. Access to our financial aid colleagues – so that we can share, learn, grow, and support one another. Access to our broader community – creating bonds with middle schools, high schools, civic, and religious organizations. With the aforementioned in mind regarding access – our theme for the upcoming year is *“Ensuring Access to All...”*

Committee Goals for 2019-2020:

I. Finance

As the costs of conferences continue to rise, NCASFAA should (and will) begin to review and assess:

- Trends of costs for conferences (e.g. hotel costs, meal costs, comparative costs of conferences in different areas of the state)
- Trends for annual budgets
- Broadening vendor sponsorship (i.e. how to help ensure that vendors receive at least nominal return on their investment – does not necessarily require purchasing products)

NCASFAA should (and will) strengthen processes to ensure that members understand the costs of the association doing business. These processes can include:

- Concurrent sessions on finance, budgeting and conference development and negotiation
- Webinars on finance, budgeting and conference development and negotiation
- Thorough review of conference (e.g. costs and balance sheet) during the conference

II. Leadership

Council of Past Presidents

Will provide guidance where precedent, rationale and intent of previous actions, and lessons learned from past events are important considerations in the decision-making process for current issues. Assist with performing studies, inquiries, or other actions. In the event that the Council becomes a standing committee, the aforementioned tasks can be self-initiated or at the request of NCASFAA Board or membership.

The Council will serve as a resource for historical information and to support the activities of the membership of NCASFAA, its Board and Committees as directed by the President. The Council will advise the Executive Board on issues of importance to NCASFAA.

For 2019-20, the Committee's charge is to consider the:

Feasibility it becoming a standing committee

- Composition and size of the committee
- Explore the creation of a Past-President Recognition Pin
- Explore the best manner to recognize past presidential leadership – e.g. banners, plaques that will be displayed during the fall and spring conferences
- Consider how to encourage retirees to continue to be engaged in NCASFAA

III. Strengthening the Association

a. Host a NCASFAA Executive Board Meeting at a Non-Traditional Location

Will host at least one Executive Board Meeting at a remote school, which we have not visited before (at least to my knowledge). This initiative coincides with the 2019-20 theme, “Ensuring Access to All...” We want to be servant leaders to our constituents - meet them where they are. The hope is by traveling to a school that is off the “beaten path,” we will demonstrate to our members that we will go gladly to lengths to serve, do, and support. The hope is also to assist our colleagues in gaining or strengthening support of the Financial Aid Office from its administration.

b. Minority Serving Institutions Workshop(s)

Will provide to HBCUs (public and private) and minority serving institution (approximately six community colleges) a one-day meeting/workshop. A committee will be convened as needed. 2019-20 President-Elect, Kamesia House will provide assistance. The workshop(s) will discuss items/issues, concerns, challenges that are germane to HBCUs and minority serving institutions.

Some topics that may be considered include:

- Perkins (Liquidation)
- Sharing tips on best practices
- Administrative Cost Allowance (its uses, how it's used. How to leverage it as part of a department's budget without losing other resources)
- Satisfactory Academic Progress
- Strategic campus partnerships
- Financial Aid Office's role in enrollment and retention (What can the Financial Aid Office do to assist?)
- Rethinking awarding financial aid (a recent CampusLogic report indicates that a number of low-income, first-generation students complete the FAFSA after March)
- Challenges and successes

c. Data Analytics and Parsing Committee

Will compile data to develop a report that provides details on the various schools throughout our state. Most of the data will be provided by entities that already have data to provide (e.g. NASFAA, the UNC System Office, North Carolina Community College System, and etc.). The data will be provided to schools to consider trends, challenges, roadblocks, and opportunities.

In the event that the Committee becomes a standing committee, the report would be developed into a database. The results will be used by NCASFSA to assist schools as needed with various projects.

Areas to consider include for the report:

- Institution:
 - Type
 - Size
 - Demographics
- Financial Aid Office
 - Construct and Staffing
 - Staffing Model
- Financial Aid Totals
 - Federal
 - State
 - Institutional
- IT Challenges and Successes
- Appropriations (where applicable)
- Endowments
- Administrative Cost Allowance
- Awarding Philosophies
- Trends
 - FAFSA Submissions
 - Awardable FAFSA Completion
 - Enrollment
 - Retention
 - Graduation
 - Melt
 - Attrition

d. Site Selection Handbook Revision

Update the Site Selection Handbook to coincide with the newly updated Policies and Procedures Manual.

e. Training

i. Training Tracks

- Develop training tracks for members who wish to become upper level financial aid managers (e.g. associate directors or directors)
- Develop training tracks for members who wish to explore opportunities in the area of strategic enrollment management (e.g. enrollment management, enrollment analytics, associate vice-president or vice-chancellor for enrollment)
- Explore the feasibility/opportunity for the training tracks to be certified – perhaps through a continuing education program at a college or university

ii. Broaden Training /Development Opportunities

Offer training /development opportunities at schools that may not have the typical opportunity to receive training (at the fall or spring conferences or at drive-in opportunities)

IV. Community Involvement

Committee to Review Fraudulent Behavior by Unscrupulous Third Parties

Will review fraudulent behaviors of third parties and determine practices to employ to combat these practices. More details will be provided later.

LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

NCASF AA held our annual Transition Board meeting on June 21, 2019 on the campus of Winston-Salem State University, Winston-Salem North Carolina. The event was attended by both outgoing members for 2018-19 and 2019-20. Our Past President Jamie Pendergrass conducted the meeting for the 2018-19 Board. Unfortunately, the Board did not have a quorum, so agenda items were discussed. The 2018-19 Board members were dismissed. (A follow-up electronic meeting to review and adopt the notes taken at the meeting as minutes.)

President Robert Muhammad welcomed the 2019-20 Board Members. After introductions, an explanation was given about the materials (in addition to the 2019-20 Handbook) that were presented to the members. The materials were a “name tent” with the hash tag #IAmNCASF AA written one side and a Malcolm Gladwell quote on the other. #IAmNCASF AA was presented in different colors and there were various Gladwell quotes available as well. Each member also received a copy of Gladwell’s book, Outliers.

The Board discussed the goals for 2019-20, making changes and additions where needed. This exercise ensured clarity of vision and fostered buy-in.

The Board the watched clip of Malcolm Gladwell, “Choice, *Happiness*, and Spaghetti Sauce.” As follow-up the members were asked to relate the content to access of education by students as well as access to colleagues.



Southern Association of Student Financial Aid Administrators

Melanie Gillespie/SCASFAA President

Executive Board Report/July 2019

Committee Members

President	Melanie Gillespie
Past President	Nikisha Howze
President-Elect	Traci Singleton
Vice President	Bridget Blackwell
Secretary	Zach Christian
Treasurer	Missy Perry
Treasurer-Elect	Samantha Hicks
Member At Large	Melissa Barnette
Advisory to CHE	Justin Pichey
-Vice Chair	Augusta Kitchen
Annual Conference*	Shannon Cross
-Vice Chair	Zach Christian
Budget*	Missy Perry
-Vice Chair	Samantha Hicks
By-Laws*	Michelle Ladato
-Vice Chair	advising from Secretary
Communications	Michelle Upchurch
-Vice Chair	Miracle Mosley
Counselor/Consumer Relations	Kellie Savoie
-Vice Chair	Danielle Rymer
Electronic Services	David Bachelder
Financial Planning	Earl Mayo
-Vice Chair	Tasha Morgan
Global Issues	Regina Hailey Smith
-Vice Chair	DJ Wetzel
Legislative Relations*	Joey Derrick

-Vice Chair	Adam Ghiloni
Lender Liaison	Ray Jones
Long Range Planning*	Michelle Jacobson
Membership*	Melissa Barnette
Nominations / Elections*	Nikisha Howze
Assoc. Volunteer and Leadership	Holly Gilliam
-Vice Chair	Samantha Hicks
Professional Dev.*	Bridget Blackwell
-Vice Chair	Stephanie McCarter
Site Selection	Elizabeth Milam
-Vice Chair	Jennifer Williams
Special Projects	N/A
Sponsorship	J.W. Kellam
-Vice Chair	Kim Chalmers

SASF AA Appointees:

Communications, Sarah Dowd
 Legislative Relations, Joey Derrick
 Site Selection, Jennifer Williams
 Electronic Services, Zach Christian

Committee Goals for 2019-2020:

- SCASF AA hopes to break through some training barriers this year by incorporating relevant, free webinars to enhance the membership. This will also give a no cost option to those members who do not have the support or staff to leave the office for training.
- Incorporate vice chairs to increase the pipeline of leaders for the future of SCASF AA.
- Have more relevant pre-con events such as New Aid Training and NASF AA U credentials.
- Evaluate the current structure that we have operated under for the past three conferences of a shortened conference. We currently start midday on a Monday and end midday on a Wednesday once a year. This is a complicated timeframe and will be evaluated this year.
- Continue our focus on Money Smart and getting more Financial Literacy opportunities out to the membership.
- Increasing the membership by reaching out to inactive schools.
- Provide a conference for more in depth training opportunities.
- Host a spring New Aid and Intermediate Officers Workshop.
- Host a Leadership Symposium for mid-level employees looking for career advancement.
- Evaluate the effectiveness and success of our SCLEAD mentorship program; new this year.
- Keep the membership informed with legislative concerns and opportunities for them to advocate.
- Send two members to the SASF AA Leadership symposium.
- Conduct an evaluation of our investments to be sure we are doing the best with them.

LRP and GAP Goal Activity to date:

- Placing folks from the LRP committee on various committees that will carry out the actions of the LRP. By placing them on the committee we can ensure the plan is followed.

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

The SCASFAA Board consists of 31 people this year. We have incorporated vice chairs to most of our committees this year in an effort to promote leadership and involvement within our organization. We had our first board meeting on June 18th as we transitioned into the 2019-2020 year. We had several team building exercises that focused on how to work within your own personality while learning how to effectively lead others who aren't like you. It was a great transition!

Theme: Moving, Motivating, and Mentoring. This is in conjunction with our goals and our charity, Meals on Wheels. We are moving across the state with training, we are motivating FAA's by empowering them, and we are mentoring vice chairs to become the next generation of leaders.





Southern Association of Student Financial Aid Administrators

Joe B. Myers, Jr., Tennessee President

Executive Board Report/July 2019

State Executive Board: TASFAA President's Report

TASFAA Executive Board & Committee Members (V indicates voting members)

- President – Joe Myers, Motlow State Community College (V)
- Past-President – Tiffany Summers, Lipscomb University (V)
- President-Elect – Danette Seale, Carson Newman University (V)
- Secretary – Amy Wood, Tennessee State University (V)
- Treasurer – Ashley Edens, Tusculum University (V)
- Community College Representative – Jennifer Byrd, Nashville State Community College (V)
- 4 Year Public Sector Representative – Jessica Howell, University of Memphis (V)
- Private Sector Representative – Tina Rich, Carson Newman University (V)
- TCAT Representative – Haley Greenway, TCAT Elizabethton (V)
- Member At Large – Eric Farmer, TN Student Assistance Corporation (V)
- Member At Large – Erin Johnson, Maryville College (V)
- Association Governance Chair – Jeff Gerkin, University of Tennessee Knoxville
- Awards Chair – Bill McCord, Middle Tennessee University
- Budget & Finance Chair – Melissa Smith, Vanderbilt University
- Conference Chair – Jeff Norrod, TN Tech University
- Diversity Chair – Regina Gilbert, Watkins College
- Electronic Services Chair – Isaac Jones, Middle Tennessee State University
- Governmental Relations Chair – Ron Gambill, Edsouth
- Historical Chair – Kacee Hardy, Dyersburg State Community College
- Membership Chair – Janette Overton, King College
- Public Relations/Blog Chair – Charles Harper, Belmont University
- Site Selection Chair – Leah Louallen, TN Student Assistance Corporation
- Sponsorship Chair – Lacey Weese, TN Wesleyan University
- State Programs Chair – Darolyn Porter, TN Student Assistance Corporation
- Training Chair – Samantha Sullivan, Vanderbilt University

Committee Goals for 2019-2020:

- Ensure that TASFAA is represented at all SASFAA Board meetings
- Encourage TAFSAA members to join SASFAA, if not already a member
- Encourage TASFAA participation in SASFAA events
- Appoint a Committee to review, update, and file a new Long-Range Strategic Plan for the period July 2020 – June 2025 for consideration

- TASFAA President-Elect will participate in the SASFAA Presidents' exchange
- Offer Fall training across the State's three regions
- Offer pre-conference events at the TASFAA annual conference
- Continue Professional Development/Credentialing for TASFAA members
- Work with TASFAA Governmental Relations on State Hill visits

LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

- Attended the SASFAA State Presidents' and Transition Board Meeting June 9 – 12, 2019 in Fort Lauderdale, FL
- Attended the NASFAA conference June 24 - 27, 2019 in Orlando, FL
- The TASFAA Transition and Executive Board meeting is scheduled for July 18 - 19, 2019 at the Embassy Suites in Franklin, TN. The Board will spend time with out-going members and will be learning about the operations of a non-profit, the management of the organization budget, parliamentary procedures, reporting formats, review the policies and procedures, and explore the current Long Range Strategic Plan. The Executive Board will be holding the first official meeting on day two.

The TASFAA Annual Conference is scheduled for April 5 – 8, 2020 at the Embassy Suites in Murfreesboro, TN



Southern Association of Student Financial Aid Administrators

Brad Scaggs, VASFAA President

Executive Board Report/July 2019

VASFAA Executive Board Members (asterisk denotes voting members)

President	Brad Scaggs*	Virginia Tech
President - Elect	Sherika Charity*	Reynolds Community College
Past President	Joan Zanders*	Northern Virginia Community College
Treasurer	Tawana French*	Virginia Tech
Treasurer - Elect	Ashley Reich*	Liberty University
Secretary	Tina Russell*	Christopher Newport University
Rep-At-Large	Marc Vernon*	Virginia Commonwealth University
Rep-At-Large	Elayne Peloquin*	University of Lynchburg
Rep-At-Large	Jackie Cottom*	Northern Virginia Community College
Rep-At-Large	Scott Morrison*	Bridgewater College
Funds Manager	Vern Fairchilds	Bridgewater College, Retired

VASFAA Theme for 2019-2020:

“Oh the places *we* ‘ll go!”

VASFAA Priorities for 2019-2020:

- Widening VASFAA’s reach by bringing events to different parts of the Commonwealth
- Increasing participation
- Finalizing outreach and high school guidance counselor resources
- Exploring how VASFAA may increase its advocacy activity
- Remaining financially sound to ensure VASFAA’s long-term viability
- Continuing to provide quality and timely training
- Providing varying modes for member feedback

LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

FASFAA held our annual Board Transition Retreat from June 16-18, 2019 at Carter Hall in Millwood, VA. The meeting was attended by both incoming and outgoing Board members; many of whom overlap. Over the two days much was accomplished. A recap is below:

- VASFAA reported 358 paid memberships in 18-19
- Committee chairs for 19-20 were approved as follows;
 - Conference Co-Chairs– Chad Sartini (VT)/Biz Daniel (Great Lakes)
 - Budget & Finance – Joe Dobrota (W&M)
 - Funds Manager – Vern Fairchilds (Bridgewater – Retired)
 - Assistant Funds Manager – John Brandt (SVU – Retired)
 - Site Selection – Tarik Boyd (NSU)
 - Membership – Laurie Owens (VCCS)
 - Government & SCHEV Relations Co-Chairs – Will Shaffner (MOHELA)/Brad Barnett (JMU)
 - Newsletter – Megan Hartless (BRCC)
 - Outreach/Awareness/PR – Mike O’Grady (FAS)/Jack Zegeer (NVCC)
 - Electronic Services – Mayra Vazquez (VWCC)
 - Development Partners – Chester Priest (KHEAA)
 - Charity – Leroy Allen (NVCC)
- This year’s theme: “Oh the places, we’ll go!” was discussed. As were some great ideas for incorporating it into our conference.
- Discussion of the upcoming VASFAA calendar including the annual Director’s Summit (September 19th); fall board meeting (October 10th); fall training (October 11th); webinars on November 7th and January 23rd; and annual conference April 19-22, 2020.
- Investment strategies were discussed; along with the amount in investment earnings that VASFAA can expect in order to support the operating budget.
- Advocacy efforts were discussed; VASFAA is exploring how it can become more involved and at what level.
- The Board approved a 19-20 budget with expenses to allow for the continuation of webinars from IronBridge and training utilization NASFAA credentials.
- Feedback from the membership on the conference and sector concerns were reviewed so that we may best serve membership in the upcoming year.
- New and past chairs and board members broke into groups to plan and formulate goals for the upcoming year and I asked that these be what the chairs and board members report on at our meetings.

Finally, a discussion of a by-law amendment and the passage of the finalized Policy and Procedures manual concluded the retreat.



Southern Association of Student Financial Aid Administrators

Sharon Oliver/President Guide Task Force

Executive Board Report/July 2019

Committee Members

Brad Barnett
Zita Barree
Nathan Basford
Amy Berrier
Ron Day
David Gelinas
Guy Gibbs
Susan Little
Lisanne Masterson
Sandy Neel
Janet Nowicki
Sharon Oliver, Chairperson
Keith Reeves

Committee Goals for 2019-2020:

- Develop a comprehensive guide for the President-Elect, President, and Past President
- Develop a calendar of events that includes the start date and planning tips

LRP and GAP Goal Activity to date:

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

An invitation was extended on June 20, 2019 to SASFAA Past Presidents to join the President Taskforce. We are pleased to share the willingness of SASFAA Past Presidents to continue to support this great association. There are several retired professionals who will serve on the President taskforce. The taskforce will be divided into three subcommittees to work on each position: President-Elect, President, or Past-President.

The taskforce will develop a comprehensive guide for the regional association that includes state, regional, and national responsibilities. A planning calendar will also be provided.



Southern Association of Student Financial Aid Administrators

Chad Sartini/Social Media Taskforce

Executive Board Report/July 2019

Committee Members/State Executive Board: Not yet established.

Committee/State Goals for 2018-2019: Develop and introduce a social media policy for SASFAA to be approved by the board.

Motion/ Action Item(s): None

Policy & Procedure: Changes/ Recommendations: None

General Updates: Researching and compiling social media policy examples from other professional associations. Taskforce membership has not been established. The goal is to have a draft policy to introduce to the board at the fall board meeting.



Southern Association of Student Financial Aid Administrators

Brenda Brown/Legal Workshop Task Force

Executive Board Report/July 2019



Southern Association of Student Financial Aid Administrators

Sarah Baumhoff, Task Force Chair, Legal Issues

Executive Board Report/July 2019

Committee Members

TBD

Committee Goals for 2019-2020:

1. Creation of a sexual harassment policy for SASFAA
2. Address any other Legal Issues identified by the Board that may require policy development or additional clarification in the current policies and procedures.

LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

Beginning collection of sexual harassment policies from other non-profit organizations.

Motion/Action Items:

Motion/ Action Item(s):

- Recommendation of University of West Florida as the site for the 2020 NAOW
- Recommending that Fall workshop registration fee remains at \$300 per person
- 2019-2020 Budget
- Conference contract with Robert Weinerman

Policy & Procedure Updates

- 3.4.2 Ballot Boxes – As was mentioned at the transition meeting. These do not exist anymore. This section should be removed from the P&P.
 - Appendix C – Need to add sponsorship guide which was approved at transition meeting
 - 12.2.3 NAOW Locations – need to add 2018 and 2019
 - 12.2.2 Annual Conference site Summary
 - 6.1.1 Professional Development – Needs to change to Advancement as per Bylaws. Maybe this is more than a technical correction. I'm not certain. Also, located in :
 - 6.14
 - 6.14.1g
 - 6.14.2 las paragraph
 - 6.13.10 Special Elections item b – the “t” is missing in the “event”. Currently, it reads “In the even”
 - 12.2.4 Leadership Seminar – October 2017 – the “L” in FL is lowcase and should be uppercase
- 6.16.1a Sponsorship Options – This section should be removed due to the approval of the sponsorship guide at the transition meeting. See page 46 and 47.