

Southern Association
of Student Financial
Aid Administrators
October Board
Meeting

Agenda and
Board Report



Prepared by Secretary Tarik J. Boyd

Table of Contents:

Agenda:.....4-5

President Board Report:6-7

President Elect Board Report:8

Past President Board Report:9

Vice President Board Report:10-11

Secretary Board Report:12

Treasurer Board Report:13

Budget & Finance Chair Board Report:14

Conference Committee Chair Board Report:15-16

Sponsorship Chair Board Report:17-18

Communications and Outreach Chair Board Report:19-20

Electronic Services Chair Board Report:21-22

Legislative Relations Committee Chair Board Report:.....23-24

Membership Chair Board Report.....25-27

Site Selection Chair Board Report:.....28-29

Global Issues Chair Board Report:.....30

Long Range Plan Chair Board Report:.....31

Alabama State Report:.....32

Florida State Report:.....33-34

Georgia State Report:.....35-36

Kentucky State Report:.....37-38

Mississippi State Report:.....39

North Carolina State Report:.....40

South Caroline State Report:.....41

Tennessee State Report:.....42-43

Virginia State Report:.....44-45

President Guide Taskforce Chair Board Report.....46

Social Media Taskforce Chair Board Report:.....47

Legal Workshop Taskforce Chair Report:.....48-49

Legal Compliance Taskfoce Chair Report.....50

Appendices:

A. Motion/ Action Item(s).....51
B. Policy & Procedure: Changes/ Recommendations.....52

AGENDA
SASFAA July Board Meeting
Renaissance Suites Charlotte NC
October 4-6, 2019
Meeting Room – Florence III

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

Friday, October 4, 2019

2:00 PM	State Presidents Meeting	Sandy
6:00 PM	Dinner on Own	All
9:00 PM	Hospitality	

Saturday, October 5, 2019

8:00 AM	Breakfast (outside meeting room)	
8:30 AM	Call to Order	Bill
	Establish a Quorum	
	Substitute voting – Joan Zanders for Brad Scaggs	

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 North Carolina	Robert
9:00 AM	Approval of Prior Minutes	Tarik
	<ul style="list-style-type: none">• July Board Meeting minutes posted with corrections on 10/3/19	

Motion/Action items

- Removing Clock hour workshop as a pre-conference training. Will instead only offer sessions during the conference. – Joan Bailey
- Working with Guidebook to renew our subscription with them for the annual conference mobile app (pricing info below)
 - Here are your Premium Guide (List: \$3,500) renewal options this time around:
 - 5-year subscription: \$2,000
 - 4-year subscription: \$2,100
 - 3-year subscription: \$2,200
 - 2-year subscription: \$2,300
 - 1-year subscription: \$2,400
 - *Multi-year subscriptions paid each year - not upfront* - Jonah
- Fine tune the new website – Steve Smith
- Adopt Roberta’s Rules of Order as the standard – Steve Smith

10: 15 AM	Break	
10:30 AM	New Business	
	•	
	Old Business	
	•	
12:00 PM	Lunch	Buffet
1:00 PM	Round of Successes (2-3 minutes)	
6:30 PM	Dinner at Clock Tower (in hotel)	
9:00 PM	Hospitality -	



Southern Association of Student Financial Aid Administrators

Bill Spiers, President

Executive Board Report/October 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:

Reviewed all committee appointments for inclusiveness

Reviewed investments with NASFAA to determine earnings after fees

Held regular phone calls with the Past-President and President-Elect to ensure continuity

Legal Issues Symposium being held after this Board Meeting

Worked with Membership Chair on membership drive

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

The President representing SASFAA at multiple NASFAA conference calls and will be attending the first NASFAA Board meeting in November. In addition, he participated in a one on one call with the NASFAA President on issues and concerns about NASFAA within the SASFAA region.

To ensure a continuity of the association and to ensure all issues are being addressed, the President, President-Elect, and Past-President have held monthly calls to ensure we are meeting deadlines and addressing issues and concerns of the membership and Board.

As SASFAA continues to seek to increase membership, calls have been held with the Membership Chair on potential campaigns to grow SASFAA. The Membership Chair has ideas he will be sharing with the Board in our meeting.

Fiscal responsibility is a major concern. The Budget/Finance chair has held calls and we have worked through multiple emails as we want to protect the financial stability of SASFAA. We are in good hands and will continue monitoring the budget to ensure SASFAA has the resources necessary to meet our financial obligations moving forward.

Excitement continues to build around our conference in Norfolk. The Conference Chair is doing a phenomenal job in the planning and execution of the conference. While the President could not attend the last conference call, the working being done from all reports is outstanding



Southern Association of Student Financial Aid Administrators

Celena Tulloss/President Elect

Executive Board Report/October 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.

LRP and GAP Goal Activity to date: N/A

Motion/ Action Item(s): N/A

Policy & Procedure: Changes/ Recommendations: N/A

Activity Summary:

Created and distributed a survey for the State Presidents to continue discussions of how SASFAA can best partner with the states moving forward.



Southern Association of Student Financial Aid Administrators

Bryan Erslan/ Immediate Past President

Executive Board Report/October 2019

Nominations & Election Committee –

Goal 1: GAP - Conduct Annual Assessment – Have already started collecting information throughout the year. Still determining committee members.

Goal 2: Solicit nominations for SASFAA and NASFAA Awards - Nominations will go out for SASFAA & NASFAA Awards in late October with reminders in November and early December. A call in closed session with the Executive Director will take place in early January to approve all awards and this will allow for time to get plaques ordered and ready to present at the annual conference in Norfolk in February 2020.

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:

Email was sent in early September seeking nominations for these positions with a due date of September 30, 2020. The Nominations and Elections Committee will meet by phone later this week and a slate will be brought to the Executive Board at the October 5 board meeting. The committee is still seeking nominations for all and currently we have two candidates to consider for President Elect, One candidate for Treasurer Elect and two for Secretary. Nominations will run through September 30 and the committee will review and recommend the entire slate of candidates.

Goal 4 – Develop a Value Statement for SASFAA

President Spiers has asked Immediate Past President Erslan to work with a group of previous SASFAA Presidents to come up with a Value Statement to be able to share with the prospective SASFAA Members, other professional higher education associations as well as other interested groups to be able to define the value of what SASFAA does as well as the value of membership of SASFAA. Due to some unforeseen delays, this work will start in early October.

Respectfully Submitted – Bryan Erslan

September 21, 2019



Southern Association of Student Financial Aid Administrators

Joan Bailey/Vice President

Executive Board Report/October 2019

Committee Members:

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
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” Brenda Brown will coordinate this workshop (in conjunction with fall board meeting)
3. Offer 2 pre-conference workshops:
 - Clock Hour workshop to be coordinated by Kim Phillips, this workshop which will continue through the conference –Revised to offering sessions during the annual 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:

- In conjunction with Brenda and her committee, and Nathan planning the fall training.
- Planning for all other training activities have begun.

Motion/ Action Item(s):

- Removing Clock hour workshop as a pre-conference training. Will instead only offer sessions during the conference.

Policy & Procedure: Changes/ Recommendations:

NONE AT THIS TIME

Activity Summary:

Working closely with Brenda and Nathan to finalize the plans for the fall training. As of 9/23/2019 total registrants were at 27, this is approximately 50% of the projection. It appears that the projection by President Spiers was affected by folks dealing with hurricane Dorian and in general training funding being reduced by institutions.

The first webinar for the year will be held on Tuesday October 1, 2019 from 10:00 to 11:30am, (currently 44 registrants). Amy will continue to encourage registration. The topic is: **Embracing Economic Diversity in Higher Education**. The 2nd webinar will be held on December 9, 2019 from 10:00 to 11:30am. The topic will be: Working with the LGBTQIA+ population, challenges faced and how FA Administrators can better serve this population.

Planning for the clock hour workshop started and indications are that there may not be a need that would generate reasonable attendance. The approach will change to including sessions during the conference versus a pre-conference workshop.

In conjunction with the committee it has been decided that we will offer half day pre-con workshops for NASFAA credentials. Participants will choose to attend either session. Topics are, Consumer Information and SAP. Another credentialing session at no additional cost will be offered during the conference that topic will be student eligibility.

Planning has also started for the mid-level pre-con workshop. Billie Jo Hamilton and Ron Day have agreed to facilitate this workshop.

I am also awaiting the contract from UWF for NAOW, in the meantime additional instructors are being solicited. I will have list of presenters for the February meeting.



Southern Association of Student Financial Aid Administrators

Tarik Boyd/Secretary

Executive Board Report/October 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 July board meeting were posted to the site on 10/3/19.



Southern Association of Student Financial Aid Administrators

Leah Louallen / Treasurer

Executive Board Report/October 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 task

LRP and GAP Goal Activity to date:

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

- Transferred all banking account information from Jenelle and forwarded President Spiers the documents to complete his transition.
- Opened new checking account specifically to allow vendors to pay for sponsorship through an ACH payment.
- Continue to communicate with management at AffiniPay regarding the correction of online payment processing fees.

Actively working with the Budget and Finance Chair to prepare the documents for the SASFAA Accountant and Auditor.



Southern Association of Student Financial Aid Administrators

Marian Dill/ Budget and Finance Chair

Executive Board Report/October 2019



Southern Association of Student Financial Aid Administrators

Joan A. Zanders/Conference 2020 Chair

Executive Board Report/October 2019

Committee Members:

Bill Spiers, Celina Tulloss, Joan Bailey, Leah Louallen, Sarah Dowd, 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):

Policy & Procedure: Changes/ Recommendations:

Activity Summary: The SASFAA Conference 2020 Committee has met three times as of the submission of this report—in-person on July 14 at Hilton Norfolk The Main and August 1 and September 10 via web. An October 3 meeting via web is scheduled. The conference theme is “Courage, Compassion, Collegiality: A Survivor’s Guide for Uncharted Waters”; registration will open in October.

Our confirmed charity is 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.

Pre-Conference Workshops:

Joan Bailey

NASFAA U Credential Training

* Consumer Information

* Satisfactory Academic Progress (SAP)

Clock Hour

Kim Phillips

Mid-Level Administrators

*Ron Day & *Billie Jo Hamilton, Facilitators

All keynote speakers are confirmed:

*Opening Speaker - Susan B. Anthony

*FTC - Quinn Martin, Attorney

ED - *Craig Munier/*Dave Bartnicki (Tentative - new fiscal year)

*Tax Presentation - Robert Weirnerman

*NASFAA - Justin Draeger & Paula Luff

*Fraudulent Documents - Doug Comfort, Fairfax County Police Detective

*Violence in the Workplace – Katie Blanchard/Jesse Milliken

Concurrent Sessions:

Many are filled and confirmed. Will be asking the Board for assistance or speaker recommendations for some sessions.



Southern Association of Student Financial Aid Administrators

Michael Birchett / Sponsorship Chair

Executive Board Report / October 2019

Committee Members

Ashley Edens – Tusculum University (TN – Paid)

Nikki Miller – Coastal Carolina University (SC – Paid)

Danette Seale – Carson-Newman (TN – Paid)

April Tretter – Bellarmine University (KY – Paid)

Committee Goals for 2019-2020:

- \$100,000 in sponsorship income

LRP and GAP Goal Activity to date:

- \$43,750 collected-to-date in sponsorship income (44% of goal)

Motion/ Action Item(s):

- N/A

Policy & Procedure: Changes/ Recommendations:

- N/A

Activity Summary:

I sent a save-the-date reminder to all potential sponsors on July 11th and immediately received several responses from interested persons. I also received several delivery errors from outdated or incorrect contact information. I quickly worked to update the list with up-to-date information.

Shortly after, I worked with Jonah Miller in Electronic Services to edit and launch the sponsorship pages. Once Brenda Brown and Joan Bailey announced the SASFAA Symposium information online, I sent a formal invitation on July 24th to all sponsors inviting them to view the provided links to the updated sponsorship opportunities and to complete the sponsorship registration online. I sent follow-up reminders on August 1st, August 29th, and September 25th. This makes a total of 5 contacts between July and September.

I have worked with several sponsors to address questions, concerns, and to convey session proposals for the 2020 conference.

I have been in contact with the hotel liaison about any drayage concerns.

I sent image files of up-to-date logos for sponsors at the Advocacy Level or higher to Brenda Brown and Joan Bailey for inclusion in the printed materials for the SASFAA Symposium. Together, we arranged for sponsorship tables for the two confirmed sponsors and a contingency table for one sponsor who was not certain they could attend.

Currently, we have confirmed sponsorship payments of \$43,750 toward our \$100,000 goal. We have \$5,750 in new sponsorship dollars and we have lost \$1,000 for a net gain of \$4,750 to date. At this time, all spots for our Lunch & Learn sessions are full.

I am tired.



Southern Association of Student Financial Aid Administrators

Sarah Dowd / Communications and Outreach

Executive Board Report/October 2019

Committee Members

Jennifer Davis
Jill Towns
Zachary Christian

Committee Goals for 2019-2020:

Increase blog publications and member involvement

LRP and GAP Goal Activity to date:

Updated Executive Board information on website
Published monthly blog,
Managed email blasts:
 Legislative (weekly)
 Events (Symposium, Webinar, Conference – all ongoing)
 Job Postings (as needed by member request)

Motion/ Action Item(s):

None at this time

Policy & Procedure: Changes/ Recommendations:

None at this time

Activity Summary:

Thank you to everyone who has submitted information and assisted in keeping the membership informed of the activities and opportunities made possible by the association.

Please remember to review the blog assignments sent by President Spiers, and let me know if you are having difficulty with your piece for the blog, or need to change to a different month. Remember that the blog can include photos and graphics, your piece does not have to be a 100% verbal article.



Southern Association of Student Financial Aid Administrators

Jonah Miller / Electronic Services Committee Chair

Executive Board Report/October 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
- Daniel Barkowitz – SASFAA Webpage / Wild Apricot
- David Alexander – TBD
- Ashley Edens – TBD

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.

Motion/ Action Item(s):

- Working with Guidebook to renew our subscription with them for the annual conference mobile app (pricing info below)
 - Here are your Premium Guide (List: \$3,500) renewal options this time around:
 - 5-year subscription: \$2,000
 - 4-year subscription: \$2,100
 - 3-year subscription: \$2,200
 - 2-year subscription: \$2,300
 - 1-year subscription: \$2,400
 - *Multi-year subscriptions paid each year - not upfront*

Policy & Procedure: Changes/ Recommendations:

- N/A at this time. Maybe later.

Activity Summary:

- Google doc created to consolidate the current 2019-2020 Volunteer Roster into one document (https://docs.google.com/spreadsheets/d/1ABvXHYRN47hCxXOxFAosl6lF0h7H-FNCnv3_gYaGh1E/edit?usp=sharing)
- Working with Leah to renew our GoToWebinar subscription (\$474 per year)
- Due to an increased number of phishing attempts to the SASFAA community, I have updated the 2019-2020 Executive Board Page (<https://www.sasfaa.org/page-1863872>) to mask email addresses of the executive board. There is a secondary private page that is available to the 2019-2020 Executive Board with this information once you sign in. This can be opened up to all SASFAA members if that is the desire of the board.

Working with the conference committee to help map out potential tech related sessions for the conference. If anyone has suggestions for this, please let me know ASAP. Current ideas for tech related sessions can be found at the following link

(https://docs.google.com/spreadsheets/d/1zMVZxvsunzFY0vTmiKu9k70ez_0ajcG0iVe7a9RBIMg/edit?usp=sharing)



Southern Association of Student Financial Aid Administrators

Ron Gambill, Chair, Legislative Relations Committee

Executive Board Report/October 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 Shaffner	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 listserv 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:

Previously submitted.

Activity Summary:

- Committee Chair, Ron Gambill, attended a legislative meeting of the Education Finance Council September 12-13, 2019. During the visit meetings with Bob Moran of the Senate HELP Committee and with Robert King, Assistant Secretary, Office of Postsecondary Education, and his Deputy, Christopher McCaghren, were

conducted.

- A conference call of the SASFAA Legislative Relations Committee is planned for October 11, 2019, at 3 pm Eastern Time.
- The Weekly Legislative Activities notice as published by NCHER has been sent to the SASFAA membership weekly.

General Updates:

- On September 19, 2019, the U.S. House passed a short-term Continuing Resolution (CR) that would extend funding for federal agencies through November 21st as the current budget expires 9-30-2019. The Senate hopes to clear its CR the week of September 23, which would avert another federal office shutdown.
- With the President calling on the Federal Reserve Chairman to reduce interest rates, the Federal Open Market Committee did recommend and pass another 25 basis point reduction in the Fed Rate on September 18, 2019.
- On August 20, 2019, the USDE released the final rules on institutional accountability for Borrower Defense to Repayment, Closed School Discharges and Collection Costs charged by Guarantee Agencies. The final rules are effective for federal student loans made on or after July 1, 2020.
- NCES published tables on Graduate Student Financing for the years from 2003-04 to 2015-16. In that period of time the average amount of federal financial aid received by eligible graduate students increased from \$19,100 to \$23,800. The average amount of Direct Plus loans increased from \$17,800 to \$22,700. The growth in private loans to graduate students was a small increase of \$500 during the same time period (\$12,200 to \$12,700).

The Fostering Undergraduate Talent by Unlocking Resources for Education Act (FUTURE Act) passed the House 9-17-2019. It was brought to the Senate floor on September 18 but was held as Senator Alexander wanted to pass a long-term solution for funding HBCU's and other minority serving institutions. For several years it has been done short-term (two years) but Alexander desires a long-term (ten years) solution. Funding remains available for 2019-2020. Alexander expressed his desire to include simplification of the FASFSFA, allowing incarcerated students who are eligible for parole to use a Pell Grant for prison education programs, allowing students to use Pell Grants for high-quality short-term programs and, Pell Grant maximum eligibility.



Southern Association of Student Financial Aid Administrators

Wayne Kruger / Membership Chair

Executive Board Report/October 2019

Committee Members: None at this time.

Committee/State Goals for 2019-2020: clean up membership database, formalize membership tracking, have members update profiles, refine auto-renewal process, and perform a membership drive.

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

LRP and GAP Goal Activity to date:

- 1) In order to ensure that the board is representative of the membership I have continued to track not just the states of our members. For the past two years, we have also tracked race, gender, and institutional type so that the data can be reviewed and used to ensure that the members are all represented.
- 2) I have worked to email members with issues and smooth out the auto-renewal process, which has led to increased membership the past two years. This covers the LRP goals on better communication and increasing membership.
- 3) Serving on the fiscal concerns committee and assisting the treasurer with cleanup of the database helps to work towards the LRP goal of being fiscally prudent.

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

Activity Summary:

- 1) I have continued to work and clean up duplicate accounts we are down from over 100 to about 39. I am taking time to try to research each person to ensure the best data is kept and that I am merging correct accounts. I have forwarded this listing with my board report.
- 2) I am working with Leah to clean up old invoices that have aged out and are a result of the incomplete auto-renewal process from last year there are 2 older than 2018-2019 and 379 from 2018-2019 year to void. I have forwarded this listing with my board report.
- 3) I have created a listing of all people that could qualify for honorary membership and reviewed them in Wild Apricot and made notes where I could. I have forwarded this listing with my board report.
- 4) An issue occurred with the setup we had done for Auto-renewal of membership. After 30 days, anyone that had not renewed flipped to an inactive status, which also voided the invoice. We were able to flip them all back to active/lapsed status but were unable to re-generate invoices.

The initial number was about 900 but now down to 609. I am working on communicating with them to explain that they can still review and either they can generate a new invoice or if we get a payment we will do it for them. Decision made not to manually re-generate invoices for all and we have updated the setting that caused this issue. I have forwarded this listing with my board report.

- 5) Currently working on a Blog post for October that will focus on updating membership accounts or the need for flexible work arrangements in higher education.

2019-2020 Membership data:

We have 742 active members for this year compared to 668 for 2018-2019 and 631 for 2017-2018. That means we have an 11.1% increase in membership since same time last year and a 17.6% increase since the same date two years ago. Below is the break down of our membership as of 09/20 for each years. I did not prepare data for 2017-2018 so I cannot account for any differences.

	2017-2018	2018-2019	2019-2020	% for current
Active	575	645	719	96.90%
Associate	15	17	15	2.02%
Honorary	40	5	7	0.94%
Retired	1	1	1	0.13%
Total	631	668	742	100.00%
-				
Alabama	37	42	45	6.06%
Florida	77	89	102	13.75%
Georgia	69	72	99	13.34%
Kentucky	51	48	57	7.68%
Mississippi	22	30	24	3.23%
North Carolina	85	98	102	13.75%
South Carolina	108	125	130	17.52%
Tennessee	63	73	74	9.97%
Virginia	55	60	71	9.57%
Other	23	31	38	5.12%
Total	590	668	742	100.00%
Public (4 Year)	n/a	243	283	38.14%
Private non-profit (4 Year)	n/a	177	188	25.34%
Public (2 Year)	n/a	99	121	16.31%
other	n/a	37	38	5.12%
Graduate/Professional	n/a	28	19	2.56%
Government Agency	n/a	18	13	1.75%
Lender	n/a	13	16	2.16%
Consultant	n/a	9	14	1.89%
Guaranty Agency	n/a	9	9	1.21%

Servicer	n/a	8	9	1.21%
Private non-profit (2 Year)	n/a	7	6	0.81%
Not Specified	n/a	6	6	0.81%
Private for profit (Business School)	n/a	5	5	0.67%
Private for profit (Technical/Trade)	n/a	5	9	1.21%
Secondary Market	n/a	2	2	0.27%
Retired Financial Aid Professional	n/a	2	2	0.27%
Health Related/Nursing	n/a	0	2	0.27%
Total	n/a	668	742	100.00%
Male	n/a	164	189	25.47%
Female	n/a	479	515	69.41%
Not Specified	n/a	25	38	5.12%
Total	n/a	668	742	100.00%
White/Caucasian	n/a	445	477	64.29%
Black/African American	n/a	134	163	21.97%
Not Specified	n/a	60	65	8.76%
Hispanic/Chicano/Mexican American	n/a	19	22	2.96%
Asian/Pacific Islander/Filipino	n/a	10	14	1.89%
Native America	n/a	0	1	0.13%
Total	n/a	668	742	100.00%
As of date:	9/20/2017	9/20/2018	9/20/2019	



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

Committee Members:

The following individuals have stepped up to serve on the site selection committee:

Florida: Irma Molinares
Mississippi: Nicole Patrick
North Carolina: Nyota Parris
Georgia: Tarik Boyd
Alabama: Erica Robinson
South Carolina: Jennifer Williams
Kentucky: Michael Birchett
Tennessee: Joe Myers
Virginia: Brad Scaggs

Committee Goals for 2019-2020:

- Assemble a site selection committee: **Completed**
- 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: **In Progress**: Will meet with President-elect, Celena Tullos, President Spiers, and others to schedule hotel visits for October 2020 meeting, GAP meeting, and sites for 2022 annual conference.
- Provide updates to the board on possible contracts for future conferences and training.
Pending
- Worked with hotel contact to plan for current board meeting, room arrangements, meals and meeting rooms for Symposium this week. **On-going**
- Work closely with conference chair in the preparation of the annual conference: **In Progress**
- I need to follow up on the discussion of having the 2022 conference in KY. I understand that there was a proposal presented for the 2021 conference however, Montgomery was selected and approved by the executive board. **On-going**

Task:

- Work with Treasurer to be sure all contracts, direct billing applications, and any deposits are processed on my end.
- Work with Site selection committee

LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

Activity Summary:

Reviewed and sent to Leah for payment to hotel for our meeting in Norfolk, VA. There were several charges that were in question and after many calls and emails resolved (SASF AA's favor). Due to the experience we had at the hotel, I will be reviewing the BEO's daily during our annual conference.

Worked with hotel staff here at the Renaissance for our current meeting. Will provide update during board meeting.

Conference call with site selection committee September 20, 2019. Kudos to Jonah for checking in to see that all was set up for the call. Committee members were sent the survey that had been provided to me earlier this year that was sent out to our member in 2017. We looked over the responses and at this time we do not feel that another survey should go out based on the results from 2017. We had the following concerns:

Were the results discussed and addressed?

For example, did the board look at the possibility of moving our annual conference to Tuesday-Friday? Could we garner better rates if we did so? A total of 381 commented with 126 highly agreeing and 148 agreeing.

Not increasing registration fee currently. (Looking at sites that help offset conference cost, such as meals, etc.)

We will move forward after the board meeting with any guidance or suggestions the board would like us to address.

Meeting with State Presidents October 4, 2019 @4:00 pm. President-elect will be in attendance. Updates of meeting will be given at board meeting.



Southern Association of Student Financial Aid Administrators

Stacy Walker/Global Issues

Executive Board Report/October 2019



Southern Association of Student Financial Aid Administrators

Sandy Neel/ LRP

Executive Board Report/July 2019



Southern Association of Student Financial Aid Administrators

Steve Smith / President, AL

Executive Board Report/October 2019

Committee 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. Mentorships set up wherever we could, as well as co-chairs.

Committee Goals for 2019-2020:

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
Increase support from sponsors

LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

Fine tune the new website
Adopt Roberta's Rules of Order as the standard

Policy & Procedure: Changes/ Recommendations:

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

Activity Summary:

Launched a new website in August powered by Member Clicks
Ordered new banners and table skirt
Completed preparations for fall training meeting in Montgomery
Toured site of 2020 spring conference with committee co-chairs. Planning underway.



Southern Association of Student Financial Aid Administrators

Daniel T. Barkowitz, Florida President

Executive Board Report/October 2019

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>

Activity Summary:

FASFAA has had a very busy summer and early fall, working to ensure that Florida’s financial aid administrators have a number of training opportunities and networking options available to them in the coming year. Highlights of our recent work include:

- As of 9/24/2019, FASFAA’s Clock Hour workshop (which will be held from October 28-30, 2019 in Altamonte Springs, FL) has 111 attendees. Of these attendees, 45 are from out of state.
- FASFAA’s 1st Webinar for the 2019-20 session was focused of the FISAP and Campus Based Aid and was held on August 8, 2019. We had 77 attendees. The workshop was presented by Kris Hatcher from Florida’s Gulf Coast State College.
- We currently have 584 members for 2019-20, which puts us ahead of membership recruitment at this point in the year. Keep in mind, our conference (which is held in late May) requires current membership, so we do have a large membership growth at the end of the year.
- We have been working on cleaning up our Memberclicks database and have formalized a policy which removes records from our database after 5 years of inactivity. This will result in approximately \$3000 in annual savings on database charges.
- We will be upgrading our Memberclicks database to the new version in December 2019 and expect a number of enhancements and benefits from the new version.

- We had our first partner / vendor advisory group call. The call was well received by our advisory group, and a number of suggestions and ideas were shared so that our partners are full participants in our association.
- Our partner package rates are published for 2019-20 and we are starting to receive commitments for the upcoming conference. We are offering a discount of 5% if paid by December. View <https://www.fasfaa.org/fasfaa-exhibitor-and-sponsorship> for more information.
- We have set up our Region Workshops for the Fall and will be holding those in the months of October and November.
- Upcoming Webinars include an Introduction to Clock Hour Financial Aid and a session Legislative Advocacy in Financial Aid.

Respectfully submitted,

Daniel Barkowitz



Southern Association of Student Financial Aid Administrators

Lakisha Sanders, GASFAA President

Executive Board Report/October 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:

The Awards and Nomination Committee was approved through via E-Meeting. We have marketed through email and website membership the registration process for sponsors/vendors and membership for colleges. With MemberClicks we are working out glitches that occurred through the registration process with individual Financial Aid Institutional registrations and sponsor/vendor registrations. We posted on the listserv detailed information about the September Deaf Awareness month and the National Hispanic Heritage Month celebrated from the middle of September through the middle of October. More technology resources for advertisement, communication, and training was introduced to the board and membership with a GASFAA Instagram account, free conference call webinar account, and a GASFAA Gmail account for graphics for emails and Board document storage. The free conference call conference line is for board use with their committees.

The GASFAA Fall Workshop is October 29-30, 2019 and hosted by Clayton State University. We will have sessions for NASFAA Core, Leadership and Mentorship, Diversity, Banner Technology, and Georgia Student Finance Commission State Aid. The event theme is Enhance Your Learning. Pass It Forward. Make A Difference. Our Fall Board meeting will be on November 1, 2019. It will cover activities for the book Dare to Lead, agenda items for voting, and more



Southern Association of Student Financial Aid Administrators

Bob Fultz / KASFAA President

Executive Board Report/October 2019Da

Committee Members

N/A

Committee Goals for 2019-2020:

N/A

LRP and GAP Goal Activity to date:

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

Activity Summary:

The Kentucky Association of Student Aid Administrator (KASFAA) has been gearing up for the Fall Conference, October 9-11, at the Holiday Inn Louisville East. The theme of the conference is Go into the Light, with a focus on the to 10 compliance issues and diving deeper into them on how to avoid/resolve. The conference is having four NASFAA U sessions as pre and post con opportunities for an additional fee on top of the conference registration fee. The conference will have a Halloween vibe, with several guest speakers including Dave Bartniki and Dana Kelley. The current SASFAA past president, Bryan Erlson will also be giving the SASFAA update, and Danette Seale from Carson Newman will be participating as part of the SASFAA president's exchange.

In the past KASFAA has collaborated with ACT for our high school counselor's workshop. We have had difficulty with them as far as their demands and changes, and KASFAA decided to end the partnership with ACT and collaborate with KASFAA for the high school counselor's workshop. The response from the councilors has not been responsive as we have had dates set for this fall, but now have decided give it one more push, and if not successful, move it to the spring.

Wednesday, KET (Kentucky Education Television) is hosting some of KASF AA members for the Financial Aid Call in Show on Wednesday, October 2. It will be taped, and then it will air in November, with a number so that families can call in and will air in November. KASF AA will have a team available for all phone call as it airs.

KASF AA also has a one day regional workshop were we will be in Ashland, Kentucky, which in on the eastern side of the state. This will give us to reachout colleges from Ohio and West Virginia that boarder the state of Kentucky. KASF AA plans to offer Consumer Information as a NASF AA U credential along with some other sessions. This will be the first time that KASF AA has been on the eastern side of the state. This one day workshop is scheduled to be on November 22, 2019. Bob Fultz is working with Rhonda Bryant to see that this is successful.

Bob Fultz

KASF AA President 2019-2020



Southern Association of Student Financial Aid Administrators

Gail Muse Beggs/MASFAA President

Executive Board Report/October 2019



Southern Association of Student Financial Aid Administrators

Robert Muhammad, North Carolina President

Executive Board Report/October 2019



Southern Association of Student Financial Aid Administrators

Melanie Gillespie/SCASFAA President

Executive Board Report/October 2019



Southern Association of Student Financial Aid Administrators

Joe B. Myers, Jr., Tennessee President

Executive Board Report/October 2019

State Executive Board: TASFAA President's Report

LRP and GAP Goal Activity to date:

N/A

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

General Update:

The TASFAA Executive Board met on July 18 – 19, 2019 at the Embassy Suites in Franklin, TN. The 2019 – 2020 Board had a productive meeting which included transition with the 2018 – 2019 Board on the 18th. The Board discussed the goals for the year as well as explored operation areas that will be reviewed during the year. The TASFAA Conference Committee will have their first meeting on October 17, 2019 at the Spring Hill Suites Nashville-Brentwood. The TASFAA Executive Board will be meeting the day following the Conference Committee on October 18, 2019 also at the SpringHill Suites Nashville-Brentwood. The annual 2019 TASFAA Fall Training series is scheduled as follow:

- October 1, 2019 – West Workshop – Lane College – Jackson, Tennessee
- October 2, 2019 – Middle Workshop – Trevecca University – Nashville, Tennessee
- October 3, 2019 – East Workshop – Johnson University – Knoxville, Tennessee

The 2019 TASFAA Fall Training series provides member attendees the opportunity to spend the day learning together around the following agenda:

- NASFAA Credentialing – Needs Analysis
- Tennessee Student Assistance Corporation Updates
- Academic Calendars – Dave Bartnicki via web conference
- Federal Update with Q&A – Dave Bartnicki via web conference

Activity & Events:

- July 18 – 19, 2019 - The 2019 - 2020 TASFAA Executive Board held the transition and first board meeting at the Embassy Suites in Franklin, TN.
- September 20, 2019 - The TASFAA President participated in the SASFAA Site Selection committee conference call.
- October 1 – 3, 2019 – 2019 TASFAA Fall Training series.
- October 4 – 5, 2019 – SASFAA State Presidents Meeting and SASFAA Executive Board Meeting.
- October 17 – 18, 2019 – TASFAA Conference Committee Meeting and Executive Board Meeting
- January 9 – 10, 2020 – TASFAA Conference Committee Meeting and Executive Board Meeting

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!”

Update on VASFAA Priorities for 2019-2020:

- **Widening VASFAA’s reach by bringing events to different parts of the Commonwealth**
 - Our first event of the year, our 4th annual Director’s Summit, will be hosted by Hollins University, in the southwestern part of the Commonwealth, on 9/19.
 - The response to this event has exceeded expectations. The event was expanded to allow 35 attendees. It is full.
 - We have also scheduled two webinars, for November 7th and January 23rd.
 - Registration just opened for our annual fall training drive-in at Blue Ridge Community College, in the northwestern part of the Commonwealth, on 10/11.
 - Planning for our Conference in Virginia Beach, in the eastern part of the state is well underway.
- **Increasing participation**
 - VASFAA’s membership committee used the template provided by FAFSAA, thanks to Daniel Barkowitz, to send emails to FA Directors throughout the state encouraging membership and participation.
 - Two rounds went out – one to former VASFAA members; and one to current Director’s that had never been members.

- We are off to a strong with 214 current members for this year. 14 of whom are new to VASFAA.
 - Early registrants at some of our events include the for-profit sector; a group that has been underrepresented in VASFAA in the past.
- **Finalizing outreach and high school guidance counselor resources**
- **Exploring how VASFAA may increase its advocacy activity**
 - VASFAA has seized on this opportunity. As the Commonwealth looks to revamp our state aid program for public institutions, our Government Relations committee has been meeting with stakeholders and has proposed a set of recommendations for the Board's consideration.
 - A special Board meeting is scheduled to consider the endorsement of these recommendations.
 - Additionally, the committee will be providing training on advocacy work to membership and providing updates throughout the year at our events.
- **Remaining financially sound to ensure VASFAA's long-term viability**
 - VASFAA ended our 18-19 fiscal year with a surplus, which is welcome news considering the lean times in recent memory. As a result we are able to re-invest this amount to continue to support our budget.
 - Vendor sponsorship information has been disseminated by our Partnership Chair. The committee has developed some creative new options for supporting the Association this year.
- **Continuing to provide quality and timely training**
 - Agendas have been finalized for the Director's Summit and the Fall Training Drive-In. We will be working to finalize webinar topics soon.
- **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:

See above information for activity by priority.



Southern Association of Student Financial Aid Administrators

Sharon Oliver/President Guide Task Force

Executive Board Report/October 2019

No report



Southern Association of Student Financial Aid Administrators

Chad Sartini/Social Media Taskforce

Executive Board Report/October 2019

Committee Members/State Executive Board: Sara Kaufman (FL), Felicia Ailster (GA), James Kellam (SC)

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: Recruited taskforce members. Members currently reviewing social media policy examples from other professional associations. The previous report stated that the taskforce would like to have a draft policy to introduce to the board at the fall board meeting. The taskforce revises this statement and plans to have a draft policy to present at the February board meeting.



Southern Association of Student Financial Aid Administrators

Brenda M. Brown / Legal Issues Task Force Chair

Executive Board Report/October 2019

Committee Members

Brenda M Brown	College Aid Services, LLC	Legal Issues Task Force Chair
----------------	---------------------------	-------------------------------

Members

Brad Barnett	James Madison university	Member (Communications)
Jenny Cun	University of South Florida, Health	Member (Publications)

Ex-Officio

Joan Bailey	University of South Florida, Health	Vice President
Nathan Basford	SASFAA Retiree	Site Selection
Michael Birchett	Bluegrass Community & Technical College	Sponsorship Chair

Committee Goals for 2019-2020:

- Provide a stand-alone training opportunity on legal issues
- Collaborate with Professional Development Committee to provide sessions/speakers for legal issues topics for other training opportunities throughout the year
- As an Executive Board member contribute to the responsibilities of being a board member:
 - to review and recommend needed revisions to governing documents of the association.
 - to represent the membership to the best of my abilities to protect the association's finances and ensure that we are contributing to advocacy efforts to protect financial aid for students and families , plus provide the professional development/training, leadership, volunteer and networking opportunities for our membership.

LRP and GAP Goal Activity to date:

LRP3/GAP13: Provide a legal issues workshop - SASFAA 2019: Legal Issues in Higher Education to higher level admins and invited member states and sister regional organizations.

LRP3: Work with VP of Training to ensure all sectors ae being served through SASFAA training events - ongoing and will work to provide legal issues topics for conference and/or webinars

GAP1: Review the bylaws annually - ongoing

GAP3: Continuously review the P & P - ongoing

GAP15: Be fiscally prudent. - collaborated with VP Training and have managed to minimize costs for legal issues workshop by securing seven speakers with no speaker fees or travel cost. We only cover food and beverage associated to their attendance at the symposium.

Motion/ Action Item(s):

None

Policy & Procedure: Changes/ Recommendations:

None at this time

Activity Summary:

Thanks to the assistance and support of Bill Mallowney, Vice President, Policy & General Counsel at Valencia College, we secured a great lineup of speakers for the SASFAA 2019 Symposium: Legal Issues in Higher Education. The [agenda](#) includes sessions on status of federal rulemaking; Title IX, Human Resources, Data Sharing & Cybersecurity and Distance learning Issues, to name a few.

The Featured Speakers are below:

- [Dennis Cariello](#), Hogan Marren Babbo & Rose, Ltd.
- [Murphie Chappell](#), University of North Carolina - Greensboro
- [Rebecca Flake](#), Cooley, LLC
- [Maureen Holland](#), Cozen O'Connor
- [Christi Hurt](#), Margolis Healy
- [Peter Lim](#), Cozen O'Connor
- [Bill Mallowney](#), Valencia College

Recognition/Kudos:

Brad Barnett – assisted with Web Content and Communications.

Jenny Cun – Program Agenda & PPT template

Joan Bailey – Food and Beverage Planning

Nathan Basford – Hotel/Event Coordinator

Michael Birchett – Sponsorship Liaison



Southern Association of Student Financial Aid Administrators

Sarah Baumhoff, Task Force Chair, Legal Issues

Executive Board Report/October 2019

Motion/Action Items:

Motion/ Action Item(s):

- Removing Clock hour workshop as a pre-conference training. Will instead only offer sessions during the conference. – Joan Bailey
- Working with Guidebook to renew our subscription with them for the annual conference mobile app (pricing info below)
 - Here are your Premium Guide (List: \$3,500) renewal options this time around:
 - 5-year subscription: \$2,000
 - 4-year subscription: \$2,100
 - 3-year subscription: \$2,200
 - 2-year subscription: \$2,300
 - 1-year subscription: \$2,400
 - *Multi-year subscriptions paid each year - not upfront* - Jonah
- Fine tune the new website – Steve Smith
- Adopt Roberta's Rules of Order as the standard – Steve Smith

Policy & Procedure Updates