

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

President Elect Board Report:7-8

Past President Board Report: 9-10

Vice President Board Report: 12-13

Secretary Board Report: 14

Treasurer Board Report: 15

Treasurer Elect Board Report..... 16

Budget & Finance Chair Board Report: 17-20

Conference Committee Chair Board Report: 21-22

Sponsorship Chair Board Report: 23

Communications and Outreach Chair Board Report: 24

Electronic Services Chair Board Report: 25

Legislative Relations Committee Chair Board Report:..... 26-28

Membership Chair and Treasurer Elect Board Report:..... 29-30

Site Selection Chair Board Report:..... 31

Global Issues Chair Board Report:..... 32-33

Legacy and Long Range Plan Committee Chair Board Report:..... 34

Alabama State Report:..... 35

Florida State Report:..... 36

Georgia State Report:.....37

Kentucky State Report:.....38

Mississippi State Report:..... 39-40

North Carolina State Report:.....41-42

South Caroline State Report:.....43

Tennessee State Report:.....44-45

Virginia State Report:.....46

Conference Guide Taskforce Chair Board Report:.....47

Financial Review Taskforce Chair Board Report:.....48

Vendor/Sponsor Guide Taskforce Chair Report:.....49

Appendices:

A. Motion/ Action Item(s).....50
B. Policy & Procedure: Changes/ Recommendations.....

AGENDA
SASFAA Board Meeting
Hyatt Knoxville – Knoxville, TN
October 5-7, 2018
Meeting Room – Meeting Space 2

Far and away the best prize that life offers is the chance to work hard at work worth doing. – Theodore Roosevelt

Friday, October 5, 2018

4:00 PM	State Presidents Meeting	Sandy
7:00 PM	Dinner at Calhouns (will need to uber, lobby at 6:30)	All
https://calhouns.com/menus-and-locations/tennessee-river/		
9:00 PM	Hospitality	Suite

Saturday, October 6, 2018

8:00 AM	Breakfast Buffet	Hotel Lobby
9:00 AM	Call to Order, Welcome and Introduction of Guests	Bryan
	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 Tennessee	Celena
9:15 AM	Approval of Prior Minutes	Tarik
	<ul style="list-style-type: none">• July Board Meeting• August e-meeting	

Motion/Action items

	<ul style="list-style-type: none">• Wild Apricot payment function recommendation	Chad
10:45 AM	Break	
11:00 AM	Discussion	
	<ul style="list-style-type: none">• GAP Committee Recommendations tabled from June<ul style="list-style-type: none">○ Conference rates○ Expenses SASFAA will cover and for whom	

12:00 PM	Lunch	Gallery Kitchen & Lobby
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1:00 PM Round of Successes (2-3 minutes)

2:30 PM New Business
Old Business

6:30 PM Meet in lobby for Dinner at 6:00 All

<https://scruffycity.com/knoxville-uncorked-learn-more/>

9:00 PM Hospitality

Sunday, October 7, 2018

8:00 AM Breakfast Buffet Hotel Lobby

If the business meeting does not conclude on Saturday, the board meeting will resume on Sunday at 9:00 am.



Southern Association of Student Financial Aid Administrators

Bryan Erslan/ President

Executive Board Report/October 2018

Committee Members/State Executive Board:

Committee/State Goals for 2018-2019:

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

General Updates:

President Erslan has been working closely with Vice President Tulloss and David Gelinis on determining which presenters would be best to utilize for the upcoming SASFAA Management Institute. That has all been finalized and he would like to thank Celena and David for their hard work putting this all together. Attendees are in for a real treat and should be a very full two days of meetings!

Although there has been no travel the past couple of months, most of the work has been done by phone calls and emails. The travel season will pick up as President Erslan will attend the KASFAA Fall Conference, October 10-12 in Northern Kentucky. The first NASFAA Board meeting will also be November 12-14, 2018 to be held in Flagstaff, AZ and he will be an observer to the board meeting. President Erslan is currently working on the state conference presentations and will be sharing those he cannot attend with Sharon and Bill as they are attending a couple of the conferences this fall. Thank you Bill and Sharon!

We have had one conference call with the conference committee since the board last met and everything seems to be on target to have an outstanding conference. Thanks to Katie and her entire committee for working so well in advance of the conference.

Numerous other calls and emails have been made this fall with a number of different individuals related to SASFAA business.



Southern Association of Student Financial Aid Administrators

Bill Spiers, President-Elect

Executive Board Report/October 2018

Committee/State Goals for 2018-2019:

Review all SASFAA By-Laws, Polices 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. Right now I am planning on attending the Alabama Conference, the South Carolina Conference, and the Florida Conference.

Establish all committees and have chairs in place by February.

Conduct the President Elect Workshop in conjunction with the annual conference in Atlanta. Invitations will be sent to the nine president-elects and presenters by December 15, 2018.

Participate in the Inter-Regional Exchange Program. Details are pending at this point. I will include details in my next Board report.

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

Participate in the NASFAA Leadership Conference.

Motion/ Action Item(s):

None

Policy & Procedure: Changes/ Recommendations:

None

General Updates:

Since the July Board meeting most of my time has been spent finalizing goals for 2019-2020 and working on committee chairs. One important position is filled with Joan Zanders serving as conference chair. I also attended and voted in the e-meeting that was held in August.

Over the next few weeks I will be attending the Midwestern Association of Student Financial Aid Administrators in Minneapolis, Minnesota with the regional exchange program. They have asked me to present on satisfactory academic progress. The Dates of the meeting are October 13-17.

In addition, I will be representing President Erslan at the South Carolina Association of Student Financial Aid Administrators November 12-14 in Hilton Head, South Carolina. It will be a honor to attend their conference.

The primary responsibilities of the President-Elect are to support the President and observe, learn, and prepare. Right now that is where I am as I prepare to serve our membership.



Southern Association of Student Financial Aid Administrators

Sharon Oliver/Immediate Past-President

Executive Board Report/October 2018

Committee Members/State Executive Board:

- Theresa May (AL)
- Nathan Basford (FL)
- Stephen Andersen (GA)
- Michael Birchett (KY)
- Stacy Walker (MS)
- Jason Johnson (NC)
- Jennifer Williams (SC)
- Charles Harper (TN)
- Elizabeth Daniel (VA)

Gap Committee Members:

Marian Dill (TN)
Sandra Neel (KY)
Stacy Walker (MS)
William Spiers (FL) - Observer
President Elect 2019 - TBD - Observer

Committee/State Goals for 2018-2019:

Goal 1: GAP - Conduct Annual Assessment
Goal 2: Solicit nominations for SASFAA and NASFAA Awards
Goal 3: Solicit nominations for President-Elect and Vice President with a dual slate of candidates

Motion/ Action Item(s):

Presentation of Slate of Officers

Policy & Procedure: Changes/ Recommendations:

Nominations and Elections

The Chair solicited nominations from August 6, 2018 through September 10, 2018 for the positions of President-Elect and Vice President. In effort to identify a dual slate of candidates for each position, there were several notifications sent to the membership to nominate candidates. Additionally, the Nominations and Elections committee members disseminated the call for nominations in each state. The Nominations and Elections committee met by conference call on Wednesday, September 19, 2018, to review nominees and identify a dual slate of officers.

Awards

A flyer has been developed and distributed to the membership to solicit award nominations for Distinguished Service Award, Honorary Membership, Special Awards, and Milestone Awards. The Nominations and Elections committee members will disseminate information regarding the awards in each state. The deadline for submitting nominees is December 15, 2018.

GAP Committee Meeting

Members of the GAP committee have been selected. The committee members were notified that the GAP Committee meeting will be held in Charlotte, NC on May 17-19, 2018. The Site Selection Chairperson, Michael Birchett, is searching for an Embassy Suites near the airport or a similar hotel to host the meeting.

Final Budget for 2017-18

The final budget for 2017-18 was disseminated to the membership on September 20, 2018. We are pleased to report that the Board of Directors honored their fiduciary duties and responsibilities by cutting costs and exceeding revenue goals in several areas. The final budget reflects total income of \$336,266.06 less expenditures of \$305,462.99, resulting in net income of \$30,803.06. Although approval was granted by the Board of Directors during the July, 2017, board meeting to transfer \$33,953 from assets to support the goals and objectives for 2017-18, no funds were transferred. A hearty thank you is extended to each board member for executing innovative strategies and techniques for supporting our members and “*Optimizing Student Success through Advocacy, Support, and Outreach*”.



Southern Association of Student Financial Aid Administrators

Celena Tulloss/Vice President

Executive Board Report/October 2018

Committee Members/State Executive Board:

Felicia Ailster, Perimeter College, GA
Sarah Dowd, Trident Technical College, SC
Donna Quick, Emmanuel College, GA
Audrey White, Samford University, AL
Heidi Hunter-Goldsworthy, UNC Chapel Hill, NC
Larry Rector, University of the Cumberlands, KY
Kevin Jacobs, Middle Tennessee State University, TN
Tolly Tollefson, UNC Greensboro, NC
Katie Conrad, Florida International University, FL
April Tretter, Bellarmine University, KY
Amy Berrier, UNC Greensboro, NC
Jonah Miller, Appalachian State University, NC
Sarah Baumhoff, Kennesaw State University, GA
David Haggard, Bryan College, TN

Committee/State Goals for 2018-2019:

Conduct a minimum of 3 webinars
Host the Management Institute as the fall workshop
Offer 2 pre-conference workshops, including the Leadership Symposium
Hold the New Aid Officer Workshop with a goal of 90 attendees

Motion/ Action Item(s): N/A

Policy & Procedure: Changes/ Recommendations: N/A

General Updates:

- Currently 31 registrants for the Management Institute and 10 guest presenters
- A total of 3 pre-conference workshops are planned
 - Excel for Financial Aid- Daniel Barkowitz and DJ Wetzel
 - Banner Popsels- Lakisha Sanders
 - Leadership Symposium- Coordinator Sandy Neel
- Webinars will begin in November



Southern Association of Student Financial Aid Administrators

Tarik Boyd/Secretary

Executive Board Report/October 2018

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:

- Eileen Brzozowski, Eastern Florida State, FL
- Sarah Dowd, Trident Technical College, SC
- Laura Keown, Centre College, KY - confirmed
- Ron Day, Kennesaw, GA - confirmed
- Marilyn DeBerry, Allen University, SC
- Audrey White, Samford University, AL
- Angela Black, University of Louisville, KY
- Chesa Donovan, Global Financial Services - confirmed
- Danielle Rymer, University of SC-Columbia, SC - confirmed
- Chad Sartini, Virginia Western CC, VA - confirmed

Committee/State Goals for 2018-2019:

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 and August e-meeting has been sent to the board for review/edits



Southern Association of Student Financial Aid Administrators

Jenelle L. Handcox/Treasurer

Executive Board Report/October 2018



Southern Association of Student Financial Aid Administrators

Leah Louallen/Treasurer Elect

Executive Board Report/October 2018

Committee Members/State Executive Board:

Committee/State Goals for 2018-2019:

- Review and understand all Association governing documents in order to best perform Treasurer Elect responsibilities.
- Assist the Treasurer in overseeing and managing the Associations financial matters.
- Ensure fiscal integrity.
- Complete all responsibilities timely and as required by the governing documents.

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:



Southern Association of Student Financial Aid Administrators

Nancy C. Tate/Budget & Finance Chair

Executive Board Report/October 2018

Committee Members/State Executive Board:

Barkowitz, Daniel, Florida (Public, 2 Year)
Barnett, Brad, Virginia (Public, 4 Year)
Barree, Zita, Virginia (Private, 4 Year)
Baumhoff, Sarah, Georgia (Public, 4 Year)
Birchett, Michael, Kentucky (Public, 2 Year)
Boutell, Heather, Kentucky (Private, 4 Year)
Feldman, Rachelle, North Carolina (Public, 4 Year)
Jernigan, Vanessa, North Carolina (Public, 2 Year)
Kelly, Michael, South Carolina (Public, 2 Year)
Parchment, Terri, Tennessee (Guaranty Agency)
Savoie, Kelly, Georgia (Lender)
Handcox, Jenelle, Treasurer, ex-officio
Louallen, Leah Treasurer-Elect, ex-officio

Committee/State Goals for 2018-2019:

- Publish final budget to the membership no later than August 1, 2018.
- Develop and maintain a zero base budget – August 1, 2018.
- Review and update the Guide to Financial Management – March 1, 2019.
- Conduct 2017-2018 financial review – December 1, 2018.

Motion/ Action Item(s):

- None at this time

Policy & Procedure: Changes/ Recommendations:

- None at this time

General Updates:

Grand Hyatt Atlanta – Atlanta, GA – February 15–20, 2019 – Conference

Room rate is \$169 single or double occupancy; \$194 triple occupancy; \$219 quadruple occupancy

Cut-Off Date is Friday, January 25, 2019

Total Contracted Guest Room Block: 1275

Total Guest Room Revenue Commitment: \$214,425; Total Guest Room Revenue Minimum: \$171,330

A rebate in the amount of \$10 per fully paid occupied room night, at the contracted guest room rate within the Guest Room Block will be credited to SASFAA following Group's payment in full of the Master Account. Group shall disclose the existence of this rebate to its members and attendees prior to the Event in all pre-Event collateral and program materials.

No food and beverage may be brought into the Hotel: public spaces or guest rooms. All food and beverage consumed in the Hotel must be purchased in the Hotel. With less than 24 hours notice, a fee of one night's room and tax will be assessed for all guest who depart Hotel earlier than the departure date confirmed at time of booking and/or listed on the registration card presented at check-in.

Hotel will provide one complimentary room for every forty revenue-producing guest rooms occupied by Group on a cumulative basis over the official event dates.

Meeting and event space rental is waived based on achieving the F&B Revenue Commitment=\$60,000

In the event that Group actualizes a minimum of eighty percent of its contracted guest room revenue commitment, Hotel, as a special consideration to Group, will provide:

- Complimentary meeting space based on a \$60,000 F&B minimum
- Complimentary high-speed wireless guest room internet
- Complimentary meeting room internet for all attendees
- Ten (10) rooms at the prevailing per diem rate over the program dates
- One complimentary one-bedroom Presidential Suite over the program dates
- One complimentary Governors Suite over the program dates
- Eight upgrade to a one-bedroom grand suite at the group rate over the program dates
- Discounted overnight self-parking at \$20 per vehicle, per day over the program dates
- Twenty-five complimentary boxes received and stored for the SASFAA office
- Three VIP roundtrip airport transfers from Hartsfield-Jackson Atlanta International Airport (ATL)
- 15% off AV equipment with exclusive use of PSAV
- 10% off F&B menus in place at the time of the program, does not apply to package or custom pricing
- Complimentary beer/wine reception hosted by hotel for one hour
- Hotel will offer complimentary meeting space for pre-planning meeting (up to 30 people) and guestrooms at the 2019 conference rate (subject to hotel availability)
- Hotel will offer a signing bonus of 50,000 Hyatt Gold Passport Points in addition to the points at program conclusion (up to an additional 50,000)

Total liability 6/16/18–10/15/18: \$168,097.50

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 no-shows 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 until February 6, 2019: \$49,665

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 until February 8, 2019: \$13,118.

Total liability: \$248,265.50

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

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	\$36,187.49	\$18,164.68	\$373,013.52	\$409,201.01
August 2018	\$422,619.11	\$2,771.06	\$0.00	\$776.77	\$498.99	\$36,465.27	\$20,935.74	\$373,013.52	\$409,478.79

SASFAA, Inc.

BALANCE SHEET

As of June 30, 2019

	TOTAL
▼ ASSETS	
▼ Current Assets	
▼ Bank Accounts	
BB&T Checking	2,842.34
BB&T Savings	47,889.72
BBT Checking II	29,824.17
Edward Jones-Money Market	2,742.29
Total Bank Accounts	\$83,298.52
▼ Other Current Assets	
Advisory Solutions 20/80 @ Edward Jones	409,478.79
Charles Schwab (NASFAA)	326,790.65
Total Other Current Assets	\$736,269.44
Total Current Assets	\$819,567.96
TOTAL ASSETS	\$819,567.96
▼ LIABILITIES AND EQUITY	
Liabilities	
Total Liabilities	
▼ Equity	
Opening Balance Equity	757,980.87
Retained Earnings	83,842.25
Net Income	-22,255.16
Total Equity	\$819,567.96
TOTAL LIABILITIES AND EQUITY	\$819,567.96



Southern Association of Student Financial Aid Administrators

Katie Harrison/Annual Conference Chair

Executive Board Report/October 2018

Committee Members/State Executive Board:

Joan Bailey	University of South Florida	Global Services
Sarah Baumhoff	Kennesaw State University	Local Arrangements
Michael Birchett	Bluegrass Community & Technical College	Site Selection
Tarik Boyd	Norfolk State University	Virginia State Rep
Zachary Christian	SC Tuition Grants Commission	South Carolina State Rep
Portia Cook	Tennessee Higher Education Commission	Tennessee State Rep
Jenny Cun	University of South Florida	Florida State Rep
Bryan Erslan	Eastern Kentucky University	President
Jenelle Handcox	University of North Carolina – Pembroke	Treasurer
Katie Harrison	SC Tuition Grants Commission	2019 Conference Chair
Wayne Kruger	St. Petersburg College	Membership
Janet Nowicki	Guilford Technical Community College	North Carolina State Rep
Nicole Patrick	Mississippi University for Women	Mississippi State Rep
Chester Priest	KHEAA	Sponsorship
Chad Sartini	Virginia Western Community College	Electronic Services
Amber Singletary	Georgia Northwestern Technical College	Georgia State Rep
Michelle Standridge	Spalding University	Kentucky State Rep
Charmaine Truelove	University of West Alabama	Alabama State Rep
Celena Tulloss	University of Tennessee	Vice President/Professional Development
Joan Zanders	Northern Virginia Community College	2020 Conference Chair

Committee/State Goals for 2018-2019:

- To provide a premier training opportunity for the Association that will offer attendees exceptional sessions, networking opportunities, and a time to reflect on what we do as aid administrators and how we can do it better. The committee will plan and execute the annual conference to be held at the Grand Hyatt Buckhead in Atlanta, Georgia, February 17-20, 2019 to meet this goal in accordance with Sections 6.6 and 11.1 of the SASFAA Policies & Procedures.
 - Since prior Board meeting, the conference committee has met twice – once in person and once via teleconference. Committee assignments have been made, and a draft agenda of sessions has been created. Guest speakers include David Bartnicki and Craig Munier (US Department of Education), Justin Draeger and Lori Vedder (NASFAA), Alex Smith (NCAA), Marvin Smith (Regional Exchange), Robert Weirnerman (Iron Bridge Resources), Joan Lord and Susan Lounsbury (Southern Regional Education Board), and Jasmine Payne (Atlanta Community Food Bank).

- SASFAA will be raising donations for two charities in two different ways. All monetary donations will be sent to a college food bank (TBD) in South Carolina (per charity rotation schedule). We will also be collecting non-perishable items on site for donation to Mimi's Pantry, a local food pantry serving students at Clark Atlanta University, Morehouse College, and Spelman College.
- Committee has decided to provide attendees with one true evening on their own, which will be Monday. On Tuesday, we will convene after dinner on your own for evening entertainment, which will combine the traditional SASFAA Bingo and a lip-sync contest.
- Registration will be open October 15th. One-day option will be available for Atlanta-area schools who wish to take advantage of it; one-day registration rate is \$150.
- SASFAA LRP I. Organizational Structure/Policies and Procedures – Continuously review P&P and document review of P&P
 - Conference Chair has preliminarily reviewed Sections 6.6 and 11.1 of the P&P. A more thorough review will be completed during the year, and any resulting recommendations will be presented to the Executive Board.
- SASFAA LRP I. Committees – Committees should represent the mosaic abilities of the membership.
 - Conference Chair has vetted committee members based on volunteer interest, length of membership in the Association, sector representation, and with sensitivity to a diverse representation of the SASFAA membership.
- SASFAA LRP I. Committees – Expand the benefits of membership by providing services and resources that meet the needs of all sectors.
 - Conference Chair has discussed the needs of the proprietary/technical/vocational school sector with the President and Membership Chair and will work with the committee to ensure training is available for those members at the conference.
- SASFAA 2017-2018 GAP Committee Recommendations – Provide Leadership Symposium as a pre-conference event.
 - Conference Chair has worked in conjunction with the Vice President to ensure meeting space is available for a 2-day pre-conference leadership symposium. February hotel room blocks have been adjusted accordingly to accommodate anticipated pre-conference attendees.

Motion/ Action Item(s):

None at this time

Policy & Procedure: Changes/ Recommendations:

None at this time



Southern Association of Student Financial Aid Administrators

Chester Priest, Sponsorship Chair

Executive Board Report/October 2018

Committee Members/State Executive Board:

Lenny Adkins

Nancy Chalker

Elizabeth Daniel

Janee Knippenberg

Committee/State Goals for 2018-2019:

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

General Updates:

- Committee members have been approved and contacted
- Training Packages have been approved and updated on the website to reflect the 18-19 year goals
- Emails have been sent to potential vendors discussing the Training Packages
- Participated in Conf Committee conference call



Southern Association of Student Financial Aid Administrators

Sarah Dowd

Communications and Outreach

Executive Board Report/October 2018

Committee Members

Paid members as of September 24, 2018

Laura Keown - KY
Aristea Williams - GA
Cynthia Henley - SC
Jill Towns - GA
Rosalind Elliot - SC
Richard Smelser - TN
Zachary Christian- SC
Kelly Savoie - Sallie Mae

Committee Goals for 2018-2019:

- assist the association in promoting events
- provide relevant and timely professional information
- increase the number of blogs published
- include more members in social media postings

LRP and GAP Goal Activity to date:

Complete – Committee, Website updates, July Blog posted

In progress – August Blog, September Blog posting, Sending emails to listserv

Motion/ Action Item(s):

None at this time.

Policy & Procedure: Changes/ Recommendations:

None at this time.



Southern Association of Student Financial Aid Administrators

Chad Sartini/Chair, Electronic Services Committee

Executive Board Report/October 2018

Committee Members/State Executive Board: Jonah Miller, Celena Tulloss, Angie Black, Jeremiah McMahon, Arminta Johnson, Daniel Barkowitz, April Tretter, Jennifer Archer, Zachary Christian, Chester Priest (ex officio)

Committee/State Goals for 2018-2019: Effectively maintain SASFAA's electronic applications.

Motion/ Action Item(s):

Wild Apricot now offers a payment function. The cost of the service is similar to PayPal. Suggest that Treasurer and Budget and Finance review and offer recommendation to either continue with PayPal as our third-party payment processor or to move to the Wild Apricot service. Information is available at <https://gethelp.wildapricot.com/en/articles/1430-wild-apricot-payments-affinipay>. According to Wild Apricot these are some of the advantages:

- No monthly fee
- Only 2.9% + \$.30 per transaction
- Payments are transferred to your bank account within 48 hours
- You can [accept credit card payments from your Wild Apricot admin app](#)
- Your members are not directed to another site for payment
- Recurring payments (aka scheduled payments) are supported
- Integrated one-stop support for both Wild Apricot and Wild Apricot Payments

Policy & Procedure: Changes/ Recommendations:



Southern Association of Student Financial Aid Administrators

Ron Gambill/Legislative Relations Chair

Executive Board Report/October 2018

Committee Members/State Executive Board:

Amy Berrier – UNC Greensboro	NC
Rhonda Bryant – University of Kentucky	KY
LaShanda Chamberlain – Mississippi Gulf Coast CC	MS
Paul Coscia – Salem College	NC
Nicole Crowley – Keiser University - Jacksonville	FL
Joey Derrick – University of South Carolina - Columbia	SC
Brett Lief, Windham Professionals, Inc.	VA
Dustin McDaniel – Athens Technical College	GA
Stacey Peterson – Old Dominion University	VA
Rhonda Smith – Shelton State Community College	AL
Ron Gambill, Edsouth - Chair	TN

Committee/State Goals for 2018-2019:

- 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 2019.
- Provide legislative webinar following the November election relative to the impact on Reauthorization.
- 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):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

General Updates:

Legislative Update

Aim Higher Act (AHA)

FASFA Simplification

The bill reduces the number of questions on the FASFA by placing the applicant into one of three pathways based on the complexity of the student and family finances. Those with the lowest income and who received a means-tested federal benefit in the previous two years will automatically receive a full Pell Grant without having to answer additional questions. The bill only requires dependent students receiving a Pell Grant to file the FASFA one time.

Grant Programs

The bill would phase out the base guarantee of the institutional allocation for FSEOG and make allocations on a new fair-share formula.

AHA expands eligibility for TEACH grant awards to include associate degree-level studies with a grant limit. It is also extended to include early childhood education. The bill adds language to address the issues leading to so many grants being converted to loans due to failed recipient certifications.

Pell Grants would receive a one-time \$500 increase to the maximum award, permanently indexing funding to inflation and increasing the mandatory funding share from 17% to 60%.

Student Eligibility Changes

The bill would provide Title IV eligibility to undocumented students. It would repeal the drug conviction language and the selective service registration requirement for Title IV eligibility.

Loan Programs

AHA eliminates loan origination fees on all federal loans and calls for a federal refinancing program. It retains and expands the Public Service Loan Forgiveness program. Expands PSLF to students who consolidated loans. The bill expands loan counseling to an annual basis and additional disclosures to be provided by institutions. Payment plans would be reduced to one fixed plan and one income-based repayment plan. The bill would expand the \$0 per month payment to borrowers earning below \$30,150 annually. Expands IBR to parent loans. The bill also requires a common manual for loan servicing.

FSA Update

- Borrower Defense to Repayment claims have been processed with 80% approved. The result was \$534.8 million in discharges.
- As of June 30, 2018, approximately 28,000 borrowers had submitted 33,000 applications for loan forgiveness under the Public Service Loan Forgiveness Program. However, about 70% were denied due to not meeting the program requirements such as having eligible loans, 120 qualifying payments, or qualifying employment.
- Outstanding Loan Portfolio held by the Department of Education is now at \$1.41 trillion and growing. 79% represents DL and just over 20% represents FFELP with less than 1% representing Perkins.
- The Delinquency Rate for borrowers in repayment and 31 days or more delinquent is 18% and 14.2% of the loan balance just representing the DL portfolio. The cumulative default portfolio held by the Department of Education continues to grow.
- There continues to be growth in the Income-Driven Repayment Plans with 7.1 million borrowers enrolled.

Appropriations Package (Minibus)

The House and Senate Appropriations Committees have conferenced on funding Labor, HHS and Education for the fiscal year 2019 including a CR for the committees that have not yet completed their work which would allow avoidance of a government shutdown. Both bodies have to approve the legislation when the House returns from its break. The compromised legislation would do the following as the bill stands:

- Provides \$22.5 billion for the Pell Grant Program and increases the maximum award to \$6,195, a \$100 increase which was included in the Senate version.
- Includes \$840 million for FSEOG and \$1.13 billion for FWS.
- TRIO funds are \$1.06 billion, which is \$50 million over last year.
- GEAR UP received a \$10 million increase over last year for a total of \$360 million.
- The bill includes \$1.68 billion for student aid administration which includes \$980 million for servicing activities. The legislation requires the Secretary of Education to allocate new borrower accounts to student loan servicers based on performance and capacity. It also requires that the Next Generation Processing and Servicing Environment contracts incentivize more support to borrowers at risk of being distressed.

The Appropriations Package also contains the allocations for Defense discretionary spending with the hope that it will be signed by the President prior to September 30, 2018.



Southern Association of Student Financial Aid Administrators

Wayne Kruger / Membership Chair

Executive Board Report/October 2018

Committee Members/State Executive Board: None at this time however I plan to ask the state presidents for the name of their states membership chair to determine if they will attend the conference and list them as the membership representative to the SASFAA board if they are members.

Committee/State Goals for 2018-2019: Completed the blog post for august, updated the member clicks emails to my information and prepared to send out membership reminders early October.

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

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

General Updates: As of 09/20 we have 668 total active members as compared to 631 listed on last year's October board report. Currently all states but Kentucky are showing an increase over last year. You will also see below break down of those active members as it related to state, institution

Level	Total	Active	Renewal overdue	Lapsed	New	Pending	last 7	last 30
Active	2769	645	2114	2100	14	10	3	17
Associate	90	17	73	73	-	-	-	-
Honorary	5	5	-	-	-	-	-	-
Inactive	-	-	-	-	-	-	-	-
Not Specified	-	-	-	-	-	-	-	-
Retired	7	1	6	6	-	-	-	-
Total	2871	668	2193	2179	14	10	3	17

Count	Gender	Count	Ethnicity
479	Female	445	White/Caucasian
164	Male	134	Black/African American
25	Not Specified	60	Not Specified
668		19	Hispanic/Chicano/Mexican American
		10	Asian/Pacific Islander/Filipino
		668	
Count	State	Count	Institution Type

125	South Carolina	243	Public (4 Year)
98	North Carolina	177	Private non-profit (4 Year)
89	Florida	99	Public (2 Year)
73	Tennessee	37	other
72	Georgia	28	Graduate/Professional
60	Virginia	18	Government Agency
48	Kentucky	13	Lender
42	Alabama	9	Consultant
31	Other	9	Guaranty Agency
30	Mississippi	8	Servicer
668		7	Private non-profit (2 Year)
		6	Not Specified
		5	Private for profit (Business School)
		5	Private for profit (Technical/Trade)
		2	Secondary Market
		2	Retired Financial Aid Professional
		668	

October 2017 Membership report:

State Membership Data

AL	FL	GA	KY	MS	NC	SC	TN	VA	Other
37	77	69	51	22	85	108	63	55	23

Active: 575 Associate: 15 Honorary: 40 Retired: 1 Total: 631



Southern Association of Student Financial Aid Administrators

Michael Birchett / Site Selection Chair

Executive Board Report – October 2018



Southern Association of Student Financial Aid Administrators

Joan Bailey/Global Issues Chair

Executive Board Report/October 2018

Committee Members/State Executive Board:

Kamesia House	Fayetteville State University	NC
Victoria Owens	Simmons College	KY
Laticia Dubose	Enterprise State	AL
Regina Gilbert	Watkins	TN
Mike O’Grady	FAS	VA
Donna Quick	Emmanuel College	GA
Kamia Mwango	Santa Fe College	FL
Traci Singleton	Citadel	SC
Amber Ofosu	Delta State University	MS

Only some members confirmed as paid members at the time of report writing so will provide an update at the meeting.

Committee/State Goals for 2018-2019:

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 etc is representative of the diversity of the organization.
3. Ensure the association is provide training and information for all sectors that we serve.
4. Providing articles for the SASFAA Nine news – intention is to provide at least one article per month starting August 2018 addressing timely in the news matters.
5. Work with the membership committee to explore possible utilization of experience members as a means to support upcoming young professionals 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 or seek members to propose at least 4 diversity related sessions for the conference.

Motion/ Action Item(s):

No Motions at this time.

Worked on soliciting members to serve on this committee, there is now representation from each state. There is also representation from different school types as well as different sectors. We had our first conference call on September 11th. We discussed conference topics and how members can provide assistance with global issues topic during the conference. Two members of the committee will also be assisting me with the food insecurities sessions at the conference. As a committee we will also be working to find presenters for a DACA session and a customer service session. We have started out monthly articles for SASFAA Nine News, the first article for the month of September has been submitted.

I have continued to work closely with the conference chair on a conference agenda and the food insecurities workshop.

I have also volunteered to do a diversity session at the leadership pre conference workshop.

Policy & Procedure: Changes/ Recommendations:

None at this time.



Southern Association of Student Financial Aid Administrators

Sandy Neel/State President Liaison and LRP

Executive Board Report/October 2018

Committee Members/State Executive Board:

State Presidents

Committee/State Goals for 2018-2019:

1. Provide mentorship and guidance to the State Presidents
2. Organize and arrange for the State Exchange program
3. Finish the "Getting Involved" project and submit it for a NASFAA award
4. Work with President and President-Elect on any Long Range Plan items
5. Other duties as assigned by the President

Activities:

Arrangements have been made for the State Exchange Program. No one will be attending a fall event so all will occur in the spring. The State Presidents were asked to review the "State President's Guide Book" to ensure it is up-to-date especially in light of updated travel procedures. The former State President's Liaison sent some additional information regarding surveys and it was suggested that the survey be given to the most recent past State President's for additional results. April Tretter took the lead on updating the powerpoint with a new picture. The State Presidents will be meeting Friday October 5, 2018 in Knoxville.

Motion/ Action Item(s):

None

Policy & Procedure: Changes/ Recommendations:

None



Southern Association of Student Financial Aid Administrators

Stephanie Miller/Alabama President

Executive Board Report/October 2018

Committee Members/State Executive Board:

AASFAA will be hosting it's annual Fall NASFAA Credential on October 18th at HC Trenholm Community College and the Fall Federal Update Workshop on October 19th at Auburn University Montgomery. The NASFAA Credential for the day will be Packaging and Notification of Awards. David Bartnicki is scheduled to speak via Webex on the topics of the Federal Update, Verification Update, Overpayments and Overawards, and the Q & A. In addition, we are awaiting approval from ED for PTAC to come and present an in person session.

Committee/State Goals for 2018-2019:

The theme for this year is Building, Empowering, and Growing Together.

The Annual Spring Conference will be held in March 19th – 21st at the Wind Creek Resort in Atmore, AL.

AASFAA is looking forward to a great year with goals to increase membership, provide outstanding training for all levels of financial aid professionals, and to collaborate with offices and agencies outside of financial aid to build, empower, and grow our knowledge, relationships, and outreach...together.

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

General Updates:

N/A



Southern Association of Student Financial Aid Administrators

David Alexander-Florida President

Executive Board Report/October 2018

Committee/State Goals for 2018-2019:

- Ensure FASFAA is represented at the regional and national level(SASFAA and NASFAA)
- Ensure that our members are given appropriate trainings and resources needed to continue student success
- This year's theme will be the "Road to Success"
- The FASFAA Annual Conference will be held from May 21-24 2019
- The New Aid Workshop is scheduled from October 30- November 1 2018
- Clock-hour workshop is scheduled from October 31-Novemeber 2 2018.
- Daniel Barkowitz, President-Elect, is scheduled to attend the Tennessee 2018-19 Annual Conference
- The FASFAA Leadership Program has resumed for 2018-19
- Increase volunteerism and advocacy

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

N/A



Southern Association of Student Financial Aid Administrators

Amber Singletary/GASFAA President

Executive Board Report/October 2018

Committee Members/State Executive Board:

Stephen Andersen: Immediate Past President-Georgia Northwestern Technical College
Lakisha Sanders: President-Elect-Clayton State University
Joe Buchholz: Vice President of Professional Development-Kennesaw State University
Donna Childres: Secretary-Georgia Highlands College
Angela Tate: Treasurer-Lanier Technical College
Kristie Teasley: Treasurer-Elect -Chattahoochee Technical College
Maria Hammett: Program Chair-Mercer University
Pennie Strong: Budget and Finance-Georgia Student Finance Commission
Brandi Esuzor: Diversity and Community Action-Chattahoochee Technical College
Syreeta Monroe: Vendor/Sponsor Chair-Savannah State University
Dustin McDaniel: Legislative Affairs-Athens Technical College
Susan Smith: Membership Development Chair-University of North Georgia
David McMillion: Communications and Technology-Piedmont College

Committee/State Goals for 2018-2019:

- Provide training that addresses the needs of all institutions in the area of compliance
- Grow the technical aspect of trainings and encourage institutions to share best practices.
- Encourage opportunities for networking which we hope will lead to members becoming resources for each other.

Motion/ Action Item(s):

none

Policy & Procedure: Changes/ Recommendations:

none

General Updates:

GASFAA's Fall Workshop is scheduled for October 3-4, 2018 in Macon, GA. The Fund Run- a marathon of financial aid learning. This training will have four different tracks: Regulations and Compliance, GSFC, Leadership, and Technical. We are hoping for 140 attendees.

Encouraging members to support the GASFAA Food Drive all year rather than only at the conference.

Planning the Fall Executive Board Meeting for late October/early November.



Southern Association of Student Financial Aid Administrators

April Tretter/ KASF AA President

Executive Board Report-October 5, 2018

Committee Members/State Executive Board:

The KASF AA fall program committee met on August 2, 2018 to prepare for the fall 2018 KASF AA conference. The first KASF AA board meeting of the 2018-2019 year was held on August 3, 2018. Both meetings were held at the Hilton Cincinnati Airport in Florence.

On September October 2, 2018, KASF AA panelists gathered in Lexington, Kentucky, to participate in a taping of our Kentucky Educational Television (KET) Network Call-In Show to share information about the October 1 FAFSA filing and other financial aid matters with the community. This year the show will air on October 15, 2018. In the past, the show was live; however, the network had many scheduling conflicts so we are not able to have it live. KASF AA volunteers will be on hand the night of the 15th to answer calls from families.

KASF AA's fall conference KASF AA Rocks Totally 80's will be held October 10-12, 2018, at the Hilton Cincinnati Airport in Florence, KY. The fall program committee has worked tirelessly to finalize a program and provide relevant session topics and trainings for attendees. Training will be provided by Department of Education trainer David Bartnicki, credentialing opportunities through six NASFAA U course offerings, strong session topics and presenters, and updates shared by SASFAA President, Bryan Erslan, and NASFAA special guest Dana Kelly, the conference will be very beneficial to KASF AA membership. On Thursday evening, KASF AA will host dinner and prom.

Several KASF AA trainings are taking place across Kentucky this fall, including workshops for high school counselors. KASF AA is planning a Fall workshop in Frankfort in November. NASFAA U topic- Cash management will be offered and business/bursar offices from across the state will be invited and encouraged to attend.

Preparations are starting for the spring 2018 conference planning meeting and the next board meeting, scheduled on December 6-17, 2018, at the Clarion Hotel in Lexington.

The KASF AA board plans to stay focused on KASF AA's mission, vision, and the goals of the long range plan in compliance with the bylaws and policies and procedures. Policies, procedures and committee structures will be evaluated and updated accordingly to effectively serve membership, to conduct standard association business and to implement the new long-range plan.



Southern Association of Student Financial Aid Administrators

Steven Taranto/MASFAA President

Executive Board Report/October 2018

Committee Members/State Executive Board:

President: Steve Taranto (University of Mississippi)
President-Elect: Gail Muse Beggs (Holmes Community College)
Past President: Stacy Walker (University of Mississippi Medical Center)
Vice-President: Terry Bland (Itawamba Community College)
Treasurer: Amber Kelly (Southwest Mississippi Community College)
Treasurer-Elect: n/a
Secretary: Clara Rock (University of Mississippi – Tupelo)
Member-At-Large: Alison Coker (University of Mississippi Medical Center)
Director: Louanne Langston (Hinds Community College)
Director: Brenda Carson (East Central Community College)
Director: Christie Rocconi (Delta State University)
Conference Chair: Nicole Patrick (Mississippi University for Women)
Diversity Chair: Amber Ofori (Delta State University)
Electronic Services Chair: Cindy Monroe (Millsaps College)
Financial & Audit Chair (2019): Megan Smith (Mississippi University for Women)
High School Relations Chair: Danny Thompson (Woodward Hines Educational Foundation-Get2College)
Legislative Chair: LaShanda Chamberlain (Mississippi Gulf Coast Community College)
Site Selection Chair: Renotta Shed (State Aid Office)
State Aid Liaison: Jennifer Rogers (Mississippi State Aid Office)
Vendor/Sponsor Chair: Carrie Cooper (University of Mississippi Medical Center)

Committee/State Goals for 2018-2019:

These were some of the goals we developed at the MASFAA transitional/planning meeting July 25-26, 2018 which were devised by using our vision and mission statements as inspiration:

As we continue to build an effective community of financial aid administrators, we want to:

- Provide to our members more opportunities for web meetings or Zoom sessions.
- Reinstate regular MASFAA board member visits to the schools in our association.

By encouraging the exchange of ideas, we hope to:

- Increase and stimulate volunteerism.
- Share more ideas/information through the MASFAA Listserv.

In developing the professional expertise of our members, we want to:

- Offer leadership, professional development, or customer service related sessions during our training events and at our annual conference.
- Poll members about their own areas of professional expertise to share and expand our professional knowledge.

By effectively and ethically promoting access to higher education, we hope to:

- Reduce barriers that hinder student access to financial aid.
- Develop MASFAA's "collective voice" for State Legislative visits and events.

In striving to meet the needs of our diverse constituents we hope to:

- Become more empathetic and better listeners.
- Think more "globally" in our approach to diversity.

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:

General Updates:

Presented \$500 gift to the Yoknapatawpha Arts Council (Oxford, MS) in memory of Kenneth Wooten.

MASFAA Fall Training – November 8-9 (Holmes Community College).

Get2College First U-HAFTA FAFSA® Challenge: MASFAA is working with Get2College who will expand efforts for student FAFSA completion through the launch of the First U-HAFTA FAFSA® Challenge for financial aid administrators in Mississippi. As a part of the challenge, participating college or university financial aid administrators are asked to adopt a high school that had a FAFSA completion rate of less than 50 percent, as of March 31, 2018. March 31 is a benchmark date for Get2College efforts, as it is the priority deadline for the MS HELP grant, a state grant that covers tuition and fees at a public institution in Mississippi for low-income students. Challenge participants who top each of the following three categories will receive a \$1,000 prize:

- Overall highest % FAFSA completion
- Overall highest % increase
- Most innovative strategy for creating a college-going culture and increasing FAFSA completion

Access the following link for more information:

<http://www.collegeaccess.org/BlogItem?dg=fb7f95c756b440c4a02df95fc0d3c961>

Continued efforts on the State Aid Redesign Task Force (Jennifer Rogers, State Aid Director and all directors of financial aid from MS colleges).



Southern Association of Student Financial Aid Administrators

Jamie Pendergrass/North Carolina President

Executive Board Report/October 2018

Committee Members/State Executive Board:

Position	Name	Institution
President	Jamie Pendergrass	NC State University
President-Elect	Robert Muhammad	Winston-Salem State University
Past-President	Jason Johnson	Guilford Technical Community College
Vice-President	Kyle McMahan	NC State University
Treasurer	Zilma Lopes	Central Carolina Community College
Secretary	Traci Mitchell	College Foundation, Inc.
Budget & Finance	Karen King	Lees-McRae College
Conference - Fall	Kendra Myers	Surry Community College
Conference - Spring	Kali Brown	Vance-Granville Community College
Diversity/Global Issues	Frank Parrilla	NC State University
Intermediate Aid Officers	Rachel Cavanaugh	Cape Fear Community College
Legislative Advisory	Victoria Lenderman	Forsyth Technical Community College
Membership	Mary Otto	Campbell University
New Aid Officers	Ann Peacock	Wake Technical Community College
Professional Affiliates	Nicki Spang	Sallie Mae
Publicity & Publications	Dan Sanchez	University of North Carolina - Wilmington
Site Selection	Biz Daniel	Great Lakes
State & High School Relations	Katrina Lee	University of Mount Olive
State Agency Liaison	Kathryn Marker	SEAA
Technology Task Force	JD Gibbs	Lenoir Community College
Training Webinars	Michelle Hemmer	William Peace University

Committee/State Goals for 2018-2019:

N/A

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

General Updates:

North Carolina is currently working to recover from the devastating effects of Hurricane Florence, which affected many of our institutions. The storm also prompted us to cancel our September 14, 2018 Executive Board meeting. A conference call will take place in early October as a make-up to this meeting and will occur before the SASFAA board meeting takes place.

North Carolina is working hard on planning our fall conference at the Harrah's Cherokee Casino & Resort, November 3-7, 2018.

We have two task forces that are currently researching topics for NCASFSA. The first is reviewing all of our governing documents to make sure they are up-to-date and relevant. The other is exploring whether we will move from two conferences to one.

North Carolina will be conducting four support staff trainings throughout the State during the month of October. These trainings are for staff that do not normally get to come to the conferences but who are vitally important to helping our offices function.

North Carolina will be sponsoring two attendees to attend the SASFAA Management Institute. We are also looking to sponsor attendees to the FASFAA Clock Hour Workshop, if any member is interested in attending.



Southern Association of Student Financial Aid Administrators

Nikisha Howze/South Carolina State President

Executive Board Report/October 6, 2018

Committee/State Goals for 2018-2019:

- Ensure that SCASFAA is represented at all SASFAA Board Meetings
- Encourage SCASFAA participation in SASFAA conference, training and events
- Participate in the state President's exchange
- Take advantage of the networking opportunities involving the state presidents and the SASFAA Board

Summary of State Activities/Events:

We are preparing for College Goal South Carolina. This is a series of workshops that will be held around the state from October – March that will assist students and parents with completing the FAFSA. We are also preparing for our Annual Conference that will be November 12 – 14, 2018 in Hilton Head, SC. Bill Spiers, SASFAA President Elect will attend the conference to give us our SASFAA update. Karen McCarthy will attend to provide us with the NASFAA update. Jamie Pendergrass, NCASFAA President and Robert Muhammad, NCASFAA President Elect will also attend our conference with the President Exchange program.

Motion/ Action Item(s): n/a

Policy & Procedure: Changes/ Recommendations: n/a



Southern Association of Student Financial Aid Administrators

Tiffany Summers/TASFEEA President

Executive Board Report/October 2018

Committee Members/State Executive Board:

N/A

Committee/State Goals for 2018-2019:

TASFEEA Goals for 2018-19

- Ensure that TASFEEA is represented at all SASFEEA Board meetings
- Encourage TASFEEA members to join SASFEEA, if not already a member
- Encourage TASFEEA participation in SASFEEA events
- TASFEEA President-Elect will participate in the SASFEEA Presidents' exchange
- Offer Fall training in October across the state's three regions
- Increase volunteerism and engagement at the state level for TASFEEA members
- Update and Review TASFEEA's Policy & Procedures to insure information is accurate and up-to-date
- Offer pre-conference events at the TASFEEA annual conference
- Continue Professional Development/Credentialing for TASFEEA members
- Work with TASFEEA Governmental Relations on State Hill visits
- Continue to strengthen relationship with THEC/TSAC for student advocacy

Motion/ Action Item(s):

N/A

Policy & Procedure: Changes/ Recommendations:

N/A

General Updates:

The TASFEEA Executive Board met on August 2-3 at the Embassy Suites in Murfreesboro, TN. The 2018-2019 Board had a productive meeting which included transition with the 2017-2018 Board. The Board discussed the goals for the year as well as opportunities for various committees to have increased involvement at the annual conference and communication amongst school sectors. The next TASFEEA Executive Board meeting is scheduled for October 18-19 at the Embassy Suites in Murfreesboro, TN. The Conference Committee will also meet at this time to begin preparations for the 2019 Annual Conference. The annual TASFEEA Fall Training series is scheduled as follows:

October 24th Johnson University (East TN)
October 25th Trevecca University (Middle TN)
October 26th Union University (West TN).

TASF^{AA} Fall Training will provide a federal update, updates from our state agency partner, TSAC, as well as offer a NASF^{AA} authorized event with a credentialing session on Professional Judgment. Registration for this three-day event will be open soon.

Upcoming TASF^{AA} Events:

October 18-19, 2018 TASF^{AA} Conference Committee Meeting and TASF^{AA} Executive Board Meeting
October 24-26, 2018 TASF^{AA} Annual Fall Training Series
January 10-11, 2019 TASF^{AA} Conference Committee Meeting and TASF^{AA} Executive Board Meeting
March 24-27, 2019 TASF^{AA} 51st Annual Conference
April 10-12, 2019 KASF^{AA} Spring Conference: President-Elect Exchange
June 2019 TASF^{AA} Executive Board Meeting and TASF^{AA} Transition Meeting



Southern Association of Student Financial Aid Administrators

Joan A. Zanders, President
Virginia Association of Student Financial Aid Administrators
Executive Board Report/October 2018

State Executive Board: VASFAA President's Report

The mission of the Virginia Association of Student Financial Aid Administrators (VASFAA) is to provide a safe and open environment for financial aid professionals from all sectors to interact, learn, and exchange ideas. With the highest level of integrity, VASFAA provides training and support and advocates for the profession so students and families seeking to afford post-secondary education in the Commonwealth are well-served.

The VASFAA Board met via webinar at 10:00 a.m. on Wednesday, July 25, 2018, for the purpose of confirming the replacement for VASFAA's Treasurer, who left the profession, and the one-year appointment of a Treasurer-Elect. Tawana French-Rivera, Treasurer-Elect, will become Treasurer, and Clint Young will fill the Treasurer-Elect position for a one-year term. Additional discussion followed to review a proposal by Robert Weinerman, Iron Bridge Resources, to suggest topics for the Directors' Summit, to brainstorm ideas for imaging/storing VASFAA archives, to determine progress on P & P updates and the strategic plan, and to review upcoming SASFAA events as discussed at the SASFAA Board meeting in Atlanta. Due to previous participation and current schedules, neither the VASFAA President nor the President-Elect will participate in a state exchange.

The 2018-2019 VASFAA Calendar (Updated)

Tuesday, September 18, *Sweet Briar College*

VASFAA Directors' Summit

Friday, September 21, 10:00 a.m.

H S Counselors' Webinar

Tuesday, October 16, *Zehmer Hall, UVA*

VASFAA Fall Training

Wednesday, October 17, *Carruthers Hall, UVA*

VASFAA Fall Board Meeting

Tuesday, November 13

Robert Weinerman, Tax Webinar

December, 2018, NOVA + Sites TBD

H.S Counselor Workshops

Thurs-Fri, February 7-8, *Hilton Norfolk The Main*

VASFAA Winter Board Meeting

Saturday, May 4, *Hilton Norfolk The Main*

VASFAA Spring Board Meeting

Sunday-Wednesday, May 5-8, *Hilton Norfolk The Main*

VASFAA Conference

Motion/ Action Item(s):

Policy & Procedure: Changes/ Recommendations:



Southern Association of Student Financial Aid Administrators

Runan Pendergrast / 2018 – 2019 Conference Taskforce Chair

Executive Board Report – October 6, 2018

Committee Members

The following SASFAA members have been asked to service on the taskforce, a confirmation to service has not been received.

Zita Barree, Hampden-Sydney College, VA
Jeff Daniels, PNC Bank, FL
Janet Norwicki, Guilford Technical Community College, NC
Carolyn Sparks, Wofford College, SC
Runan Pendergrast, Bluegrass Community and Technical College, KY

Taskforce Goals for 2018-2019:

- Review the current Conference Guide. Completed by the chair September 7, 2018
- Work with other Taskforce to create an inclusive guide for future committees
- Present recommendation to the SASFAA Executive Board at the June 2019 Board Meeting.

LRP and GAP Goal Activity to date:

GOAL 7: Committees should represent the mosaic abilities of the membership.
Worked with SASFAA President to create a diverse committee.

Motion/ Action Item(s):

No motions or action items at this time

Policy & Procedure: Changes/ Recommendations:

No Policy & Procedures changes or recommendations at this time.

New Ideas/Suggestions/ Personal Thoughts and Recommendations:

- The chair conducted a review of the current Conference Guide. It appears the guide has not been updated since 2006.
- Chair asked committee to send a job description of their state association's Local Arrangement Committee, if they had a committee.
- Chair has drafted an outline for the guide. The outline will be sent to the committee to review prior to the committee conference call.

Conference call with the committee is being scheduled for the week of October 22.

Financial Review Task Force

Vendor/Sponsor Guide Taskforce

Motion/Action Items:

Motion/ Action Item(s):

Wild Apricot now offers a payment function. The cost of the service is similar to PayPal. Suggest that Treasurer and Budget and Finance review and offer recommendation to either continue with PayPal as our third-party payment processor or to move to the Wild Apricot service. Information is available at <https://gethelp.wildapricot.com/en/articles/1430-wild-apricot-payments-affinipay>. According to Wild Apricot these are some of the advantages:

- No monthly fee
- Only 2.9% + \$.30 per transaction
- Payments are transferred to your bank account within 48 hours
- You can [accept credit card payments from your Wild Apricot admin app](#)
- Your members are not directed to another site for payment
- Recurring payments (aka scheduled payments) are supported
- Integrated one-stop support for both Wild Apricot and Wild Apricot Payments