

# South Carolina Association of Student Financial Aid Administrators



2020-2021 Executive Board Meeting  
DATE 4/13/2021  
LOCATION E-Meeting

## Present

Traci Singleton  
Zach Christian  
Carolyn Sparks  
Michelle Upchurch  
Ray Jones  
Danielle Rymer

Jennifer Williams  
Holly Gilliam  
Melanie Gillespie  
Kim Chambers  
Elizabeth Miliam

Michelle Jacobson  
Samantha Hicks  
Kelly Savoie  
Justin Peachy  
Joey Derrick

## Meeting

President Singleton called the 2020-2021 Executive Board Meeting agenda to order at 2:15 pm. A quorum was established.

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

***Action Item: Approval of the February E-Meeting Minutes and February Call-in Minutes. Zachary Christian moved to approve the minutes and Melanie Gillespie seconded the motion, which carried.***

There was no old business to report.

The SASFAA Conference was held February 17<sup>th</sup> -25<sup>th</sup>. There were 731 registrants; a breakdown per state has not been given. The Sponsorship Partners Services Directory is now live. This directory is available to assist with business solutions.

Elections were held, the results of the elections is as follows: Michael Morgan, President Elect and Leigh Ann Hussey Vice President.

This year's charity is PAGE (Partnership for Appalachian Girls' Education), donations are being accepted until June 30, 2021.

The Director's Summit was held March 30-31<sup>st</sup>

Enrollment Management Forum- April 1-29<sup>th</sup>

NAOW- June 7th-18<sup>th</sup>

Transition Board Meeting: date to be determined.

Madame President took the concerns that we discussed in February back to the SASFAA Board about the Diversity Symposium. The program has been finalized. SASFAA will be responsible for all expenses for the participants.

The board has also approved to hire a bookkeeper. The person employed will be a contract employee and receive a \$500/month stipend. The position will be advertised on the SASFAA and states listserv. A copy of the job description is available if you are interested in reviewing.

## **Report of Officers**

**President** – Traci Singleton reported – Madame President would like for the deadline for donations for the SCASFFA Charity be extended to June 15. Also, wants to send out reminders. Treasurer, Samantha Hicks stated that will not be an issue. Zach stated that she should ask Terria to add that reminder to the inspirational emails she sends out. Because May is Mental Health Month. This is a good way to advertise the charity and get more donations.,

**Past President** – Melanie Gillespie reported – Melanie reported that ballots were destroyed. Carolyn has reached out to all that participated in the election to be a chair or co-chair for the various committees.

**Vice President/ Professional Development** – Justin Pichey reported – Justin will send a report later. Currently his committee is looking to have some summer training. They are looking for presenters for New Aid/Leadership workshop for June 1-3. Also, Tier 1 Sponsor Webinars, April 28 -May 21. Sponsors will pick dates and then event registration will be sent out to membership. They are proposing a \$15-20 charge.

**President Elect/Special Projects** – Carolyn Sparks reported – She has committee chairs and co-chairs for all committees for next year. Everyone she asked said yes. Melanie sent out a survey about the transition meeting if you have not respond please do so ASAP. Transition meeting will be June 6,7,8 at Embassy Suites, Myrtle Beach.

The theme for next year will be "*Commitment*". Has someone working on the logo. The charity will be the Parkinson's Foundation. She is unsure if she will attend NASFAA this year.

**Secretary/ By Laws** – Michelle Upchurch reported – nothing to report.

**Treasurer/ Budget** – Samantha Hicks reported – Samantha and Michelle Jacobson have reconciled through March. Samantha stated that some budget line items need to be updated in P&P&. The proposed changes are in the treasurer report.

Samantha made a motion to updated codes. All voted yes. Motion carried.

We have excess cash in the BB&T checking account that needs to be moved to reserves. She would like to move \$15,000. Melanie suggested we only move \$10 or 11, 000. We need to be sure there is enough funds in checking to cover transition.

**Treasurer/Elect** - Michelle Jacobson reported – Michelle proposed that we begin accepting online credit card payments, she wants to have this set up before transition. There will be no monthly fee, service fees include 2.9% plus \$.30 per transaction. She would like to increase the budget line item to \$3,000 to cover these fees. We will only accept Visa and Mastercard. Funds will automatically transfer to our checking account the end of each business day. There will be a \$.30 fee to issue refunds. Therefore, she would like to only issue refunds by check. Melanie suggested we do electronic refunds, because a stamp and envelope cost more than \$.30 and it saves manual time spent.

Michelle – Made a motion to accept online payments for the 2021-2022 year. All voted yes. Motion Moved.

**Member At Large** – Regina Haley Smith– not in attendance, Traci reported emails have been sent for updates to profiles.

### **Committee Reports**

**Advisory to CHE** – Gus Kitchen – not in attendance, Kelly reported there was a call about College Goal and FAFSA videos to be sent out.

**Communications** – Michelle Ladato – not in attendance, nothing to report. Traci stated that she has reached out to Michelle on several occasions with no response. Traci would like at least one newsletter to go out this year. Traci stated that Ana Montjoy the co-chair is willing to put a newsletter together. Traci will reach out to Ana and have Michelle Upchurch, former chair to forward templates and information.

**Consumer/ Counselor Relations** – Kelly Savoie reported – The Water Cooler Events have been successful. Planned Monthly Tips articles – scheduling committee meeting to refine and get scheduled – delayed in scheduling.

Recorded Financial Aid night with Elizabeth Milam and distributed to CHE. Submitted to Palmetto School Counselor for virtual conference. Webinar on SCASFAA for Financial Literacy month

**Electronic Services** – Katie Harrison–Not in attendance. Zach reported that Carolyn has asked him to continue working with committee.

They have created and posted a SCASFFA Google Calendar. Money Smart events and save the date for the conference have already been posted. The June workshops will be added when they are finalized. Any committee can be granted access, just contact Zach. Traci asked that an email be sent out to notify the membership about the calendar.

They have updated and cleaned up links on the website.

**Financial Planning** – Earl Mayo – Was not in attendance. Traci read his report to the board.

Accomplishments:

2019-2020 Financial Review completed and submitted October 16, 2020.

Monthly investments income input to QB is up to date.

2020-2021 First and Second Quarter Reviews Completed.

Second Quarter Review attached.

Third Quarter Review is started.

**Global Issues** – Terria Williams reported – not in attendance. Nothing to report.

**Legislative Relations** – Joey Derrick reported – nothing to report.

**Loan Agency Liaison** – Ray Jones reported – SC Student Loan Bill of Rights did not make to out of the house committee. There is a new bill that will require all seniors to complete a FAFSA.

The impacts of Loan Forgiveness is still being looked at.

**Conference** – Zach Christian reported – nothing to report.

Melanie reported that the face-to-face conference last year was canceled in early June, but talk of canceling it started in April. WE were covered last year due to the *Force Majeure* Clause. However, if the governor opens the state back up completely will not have that to use if we decide to go virtual this fall. She has been in deep talks with Embassy Suites about this fall. If we have to cancel, we may be held liable for conference cost which will bankrupt us. Cannot get them to put anything in writing at this time about compromises but they are willing to reconvene in June after schools have looked at budgets and mandates.

Transition will be at Embassy Suites June 6,7,8. Most members reported on the survey that their institution will pay. Breakfast buffet will be included, but no Happy Hour, they will be giving out 2 drink tickets.

The decision to have a face to face or virtual conference will be decided by the 202-2021 board in May-June. May look at a spring conference instead of fall. But if schools do not have funds to send staff in fall likely won't have it in spring either. There was also discussion of a hybrid conference.

**Site Selection** – Elizabeth Miliam reported – Dates for the next two years have been set.

|                  |  |                            |
|------------------|--|----------------------------|
| <b>Fall 2021</b> | <b>Embassy Suites Myrtle Beach/Kingston Plantation</b> | <b>October 17-20, 2021</b> |
| <b>Fall 2022</b> | <b>Marina Inn at Grande Dunes, Myrtle Beach</b>        | <b>October 16-19, 2022</b> |

Both venues include a *Force Majeure* Clause (acts of God, war, governmental regulations, terrorism, disaster, civil disorder, etc.), but as the state is now “open” per the Governor’s executive order, the 2021 Conference Chair, Melanie Gillespie, is moving forward with plans for an in-person conference. Numbers will be highly dependent on state and institutional travel regulations and budgets.

**Association Involvement and Leadership Force** – Holly Gilliam reported – All committee descriptions have been updated on the website.

Volunteer testimonials being added to Facebook. Carolyn Sparks and Samantha Hicks have recorded for us. Need more.

Survey for volunteers will be sent as Google Forms later this month.

**Sponsorship** – Kim Chambers reported – Nothing to report.

**Long Range Plan** – Michelle Jacobson reported – nothing to report.

### New Business

No new Business.

### Announcements and Closing Remarks

No Closing remarks.

The meeting adjourned at 3:58pm.

Respectfully Submitted,

Michelle Upchurch  
2020-2021 SCASFAA Secretary