



Commitment



South Carolina Association
of
Student Financial Aid Administrators

2021-2022 Executive Board Meeting

DATE 4/12/2022

LOCATION - Zoom

Present

Traci Singleton
Zach Christian
Carolyn Sparks
Kyle Wade
Nicole Brownlow

Missy Perry
Holly Gilliam
Ana Mountjoy
Elizabeth Milam
Joey Derrick

Michelle Jacobson
Regina Haley Smith
Michelle Upchurch
Samantha Hicks
Danielle Rymer

Meeting

President Sparks called the 2021-22 Executive Board Meeting to order at 9:37 AM. 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 non-standing committees.

There was no old business to report.

Report of Officers

President – Carolyn Sparks –SASFAA Update – Attended the annual conference in February 18-23. Transition Meeting will be June 6-7, 2022.

Past President – Traci Singleton reported that she has signed the paperwork and will be retiring from the Citadel.

Vice President/ Professional Development – Samantha Hicks – Wanted to thank all who helped and participated in the New Aid and Interim Aid workshops. We had 27 attendees. There are 14 signed up for the spring book club. Leadership Symposium is scheduled for May 17 at Columbia College.

President Elect/Special Projects – Missy Perry reported Transition Meetings will be June 6-7, 2022, at the Newberry Piedmont Technical College Campus.

Secretary/ By Laws – Michelle Upchurch –

Action Item: Approval of the board meeting minutes. Samantha Hicks made a motion and Holly Gilliam second, so moved.

Treasurer/ Budget –Michelle Jacobson – Budget and Financials were sent out for everyone’s review. There were no questions about budget or financials for Michelle. Michelle has assumed a new position outside of Financial Aid; however, she will be in Financial Aid until June. Her new position will be the Educational Technology Coordinator and Trainer.

Treasurer/Elect - Regina Hailey Smith - Reported we still have 10 members that have not paid membership dues. Other details concerning payments and electronic transactions can be found on the Treasurer Elect Board Report.

Member At Large – Holly Gilliam – Reported that we had a uptick in membership:

Active	318
Affiliate	29
Honorary	7
Lifetime	22

Committee Reports

Communications – Ana Mountjoy – Apologized for not putting out a Spring Palmetto Pages. SH has had a lot going on personally. Will get the Palmetto Pages going today and get it sent out soon.

Financial Awareness – Danielle Rymer – Reported she has no updates. She wanted to give a special thanks to Kelly Savoie for hosting the SCASFA at the Water Cooler events.

Electronic Services – Zach Christian – Nothing new to report, other than he will have an extensive list of Electronic Services duties for transition and for the future. All SCASFAA domains have been renewed for 5 years. The only renewals that will be coming up are for the ListServe and Wild Apricot in August.

Financial Planning – Elizabeth Milam gave thank you to Michelle Jacobson and Regina for doing a great job with the financials this year.

Legislative Relations – Adam Ghiloni – not in attendance. Joey Derrick read over the board report submitted by Adam. Please see report for details.

Loan Agency Liaison (Business Partners) – Shannon Jones – was not in attendance please see board report.

Conference – Melanie Gillespie – not in attendance. Nothing to report.

Site Selection – Jennifer Williams – not in attendance. Nothing to report.

Association Involvement and Leadership Force (Volunteer Committee) – Kyle Wade – stated there was not much to report. Sometime this month he will be sending out a push for volunteers. Please let him know if any committee needs volunteers. Zack stated that we need to find more ways to get sponsors involved without taking away from volunteers.

Sponsorship – Nicole Brownlow - Reported – she is working on updating the Sponsorship procedures for transition.

New Business

No new business.

Announcements and Closing Remarks

Transition will be June 6-7, 2022 at Newberry Campus of Piedmont Technical College.

Leadership Symposium will May 17 at Columbia College.

Adjourned 10:32 AM.

Respectfully Submitted,

Michelle Upchurch
2020-2021 SCASFAA Secretary



SCASFAA 2021-2022 Board Report

Date	April 8, 2022
Committee	President
Committee Chair	
Vice-Chair	

Committee Member	Institution
Carolyn Sparks, President	Wofford
2021-2022 SCASFAA Board	

Goals:

- To continue the history and strength of SCASAA by providing profession development opportunities to better understand the regulations of federal and state financial aid.
- Provide professional development opportunities while being fiscally responsible for the financial well-being of the Association.
- To provide opportunities for leadership development for the growth and longevity of the Association.
- Review the governing documents to ensure the Association is abiding by those for the sustainability of the Association.

Accomplishments:

- As a follow up to meeting with CHE staff, Adam Ghiloni conducted a State and Legislative Advocacy Consensus Building Workshop at the January 2022 Board meeting. Heaps of wonderful ideas and thoughts came to light. I am hopeful we will be able to see our collaboration efforts come to fruition.
- Attended the annual SASFAA conference held in Montgomery, AL, February 18-23, 2022.
- Emailed the New and Intermediate Officers Workshop participants as a gesture of thankfulness and encourage SCASFAA involvement.
- Continued participation in SASFAA Board related activities.
- Consulted with Missy Perry about dates for the transition board transition meeting: June 6-7, 2022.

Submitted by:

Carolyn B. Sparks

2021-2022 SCASFAA President



SCASFAA 2021-2022 Board Report

Date	04/06/2022
Committee	Professional Development
Committee Chair	Samantha Hicks
Vice-Chair	N/A

Committee Member	Institution
Justin Pichey	Columbia College
Nicole Brownlow	Trident Technical College
Traci Singleton	Citadel
JW Kellam	Converse College
Adam Ghiloni	Tri-County Technical College
Kala Hudson	Converse College
Missy Perry	Piedmont Technical College
Holly Gillam	USC Columbia
Katie Harrison	SC Tuition Grants

Goals:

- Form the professional development committee
- Make more use of SCASFAA LinkedIn Group by sharing professional development opportunities
- To schedule a 2021-2022 professional development calendar that consists of:
 - Quarterly webinars on professional development centered on Commitment theme,
 - Pre-Conference NASFAAU Session(s)
 - 2 Virtual Book Clubs related to Professional Development
 - New Aid/Intermediate Workshop
 - Leadership Symposium

Accomplishments:

- New/Intermediate Aid Workshop – 27 Attendees
 - Thank you to those involved – presenting & logistics!
- 14 people signed up for Spring Book Club
- Leadership Symposium in May
 - Reserved Tuesday, May 17th - Breed Leadership Center Room #103 at Columbia College
- Posted webinar from IronBridge Resources

Remaining Tasks for the Year:








- Spring Book Club – Brene Brown's *Dare to Lead*
- New/Intermediate Aid Workshop – March 22nd & 23rd, 2022
 - Waiting on one person's NASFAAU ID#
 - Board invitation?
- Leadership Symposium (May)

Submitted by: Samantha Hicks



SCASFAA Professional Development
2021-2022 Calendar



<p>July</p> <p>Take Care of Yourself!</p> 	<p>August</p> <p>Hang in There! We've got this!</p>	<p>September</p> <p>Webinar #1: Commitment to Self</p> 
<p>October</p> <p>NASFAA-U Preconference Sessions (Verification, COA) SCASFAA Annual Conference! Oct. 17-20!</p>	<p>November</p> <p>Webinar #2: Commitment to Your Profession</p> <p>Bookclub #1 Chat!</p> 	<p>December</p> <p>Bookclub #1 Chat!</p>
<p>January</p> <p>Bookclub #1 Chat!</p> 	<p>February</p> <p>Webinar #3 Commitment to Your Team</p> <p>Bookclub #1 Chat!</p>	<p>March</p> <p>New/Intermediate Aid Officer Workshop</p> <p>Bookclub #2 Chat!</p> 
<p>April</p> <p>Webinar #4: Commitment to Students!</p> <p>Bookclub #2 Chat!</p> 	<p>May</p> <p>Leadership Symposium</p> <p>Bookclub #2 Chat!</p>	<p>June</p> <p>Bookclub #2 Chat!</p> 




Commitment



SCASFAA 2021-2022 Board Report

Date	4.6.22
Committee	Budget Committee
Committee Chair	Michelle Jacobson, Treasurer
Vice-Chair	Regina Hailey Smith, Treasurer-Elect

Committee Member	Institution
Carolyn Sparks, President	Wofford
Missy Perry, President-Elect	Piedmont Technical College
Traci Singleton, Past-President	The Citadel
Samantha Hicks, Past Treasurer	Coastal Carolina University
Elizabeth Milam, Financial Planning Chair	Clemson University
Nicole Brownlow, Sponsorship Chair	Trident Technical College
Melanie Gillespie, Conference Chair	TriCounty Technical College

Goals:

- Reconcile Bank Account Monthly
- Provide Current Budget Report at each Executive Board Meeting
- Respond to any findings/suggestions from the Financial Planning Committee
- Update the Financial Planning Guide

Accomplishments:

- January – March has been reconciled. Will send Quarter 3 documents for review in April.
- All NAOW expenses have been reimbursed/paid

Attached:

- 2021-2022 Budgets vs. Actuals as of 4.6.22
- 2021-2022 Balance Sheet as of 4.6.22
- 2021-2022 Aging Receivables as of 4.6.22

Submitted by: Michelle Jacobson, Treasurer

SCASFAA

Budget vs. Actuals: SCASFAA 2021-2022 - FY22 P&L

July 2021 - June 2022

	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	REMAINING
Income				
003 Contingency/Transfer of Assets		7,250.00	-7,250.00	7,250.00
005 Other Income		100.00	-100.00	100.00
007 Charity Income	2,847.00	1,000.00	1,847.00	-1,847.00
020 Membership Dues		10,200.00	-10,200.00	10,200.00
020.1 CY Membership	10,470.00		10,470.00	-10,470.00
Total 020 Membership Dues	10,470.00	10,200.00	270.00	-270.00
030 Fall Conference		21,500.00	-21,500.00	21,500.00
030.1 CY Conference	26,850.00		26,850.00	-26,850.00
Total 030 Fall Conference	26,850.00	21,500.00	5,350.00	-5,350.00
050 Professional Development Income				
050.1 New Aid Officers' Workshop	2,025.00	800.00	1,225.00	-1,225.00
050.5 NASFAA Decentralized	800.00		800.00	-800.00
050.7 Other Workshops		800.00	-800.00	800.00
Total 050 Professional Development Income	2,825.00	1,600.00	1,225.00	-1,225.00
070 Sponsorships				
070.1 Conference	26,600.00	30,000.00	-3,400.00	3,400.00
Total 070 Sponsorships	26,600.00	30,000.00	-3,400.00	3,400.00
080 Interest				
080.1 Checking	6.48		6.48	-6.48
Total 080 Interest	6.48		6.48	-6.48
083 Dividends Earned		2,500.00	-2,500.00	2,500.00
085 Capital Gains		3,000.00	-3,000.00	3,000.00
Total Income	\$69,598.48	\$77,150.00	\$ -7,551.52	\$7,551.52
GROSS PROFIT	\$69,598.48	\$77,150.00	\$ -7,551.52	\$7,551.52
Expenses				
101 President	2,830.91	4,000.00	-1,169.09	1,169.09
101A Travel	264.10		264.10	-264.10
Total 101 President	3,095.01	4,000.00	-904.99	904.99
102 President-Elect	3,240.09	6,000.00	-2,759.91	2,759.91
103 Vice-President		100.00	-100.00	100.00
104 Secretary		100.00	-100.00	100.00
105 Treasurer	928.76	1,400.00	-471.24	471.24
105B Supplies	13.74		13.74	-13.74
Total 105 Treasurer	942.50	1,400.00	-457.50	457.50
106 Member at Large	211.03	200.00	11.03	-11.03
107 Treasurer-Elect		100.00	-100.00	100.00
201 Membership Committee		300.00	-300.00	300.00
202 Communications		100.00	-100.00	100.00
203 Program-Fall Conference	31,746.12	40,000.00	-8,253.88	8,253.88
205 Nominations & Elections	89.00	100.00	-11.00	11.00

SCASFAA

Budget vs. Actuals: SCASFAA 2021-2022 - FY22 P&L

July 2021 - June 2022

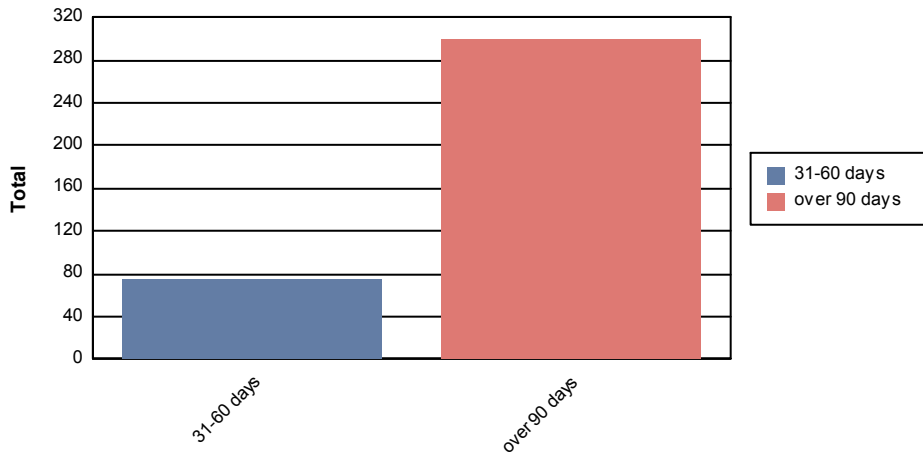
	TOTAL			
	ACTUAL	BUDGET	OVER BUDGET	REMAINING
206 Legislative Relations		1,000.00	-1,000.00	1,000.00
207 Consumer Relations		600.00	-600.00	600.00
208 President's Contingency		1,000.00	-1,000.00	1,000.00
209 Miscellaneous		500.00	-500.00	500.00
213 Professional Development				
213.1 New Aid Officers' Workshop	792.31	1,500.00	-707.69	707.69
213.7 Other Workshops	1,000.00	1,000.00	0.00	0.00
Total 213 Professional Development	1,792.31	2,500.00	-707.69	707.69
213.8 Charles Witten Professional Development Fellowship		200.00	-200.00	200.00
221 Long Range Planning		100.00	-100.00	100.00
222 Sponsorship	400.00	700.00	-300.00	300.00
224 Site Selection		100.00	-100.00	100.00
225 Special Projects		600.00	-600.00	600.00
226 Executive Board				
226.1 Transitional Board Meeting		3,500.00	-3,500.00	3,500.00
226.2 Board Meetings	193.25	1,000.00	-806.75	806.75
Total 226 Executive Board	193.25	4,500.00	-4,306.75	4,306.75
227 Insurance & Bonding	374.00	800.00	-426.00	426.00
228 Electronic Services	2,795.90	4,250.00	-1,454.10	1,454.10
229 Scholarship Awards	2,000.00	2,000.00	0.00	0.00
230 Advisory Committee to CHE		100.00	-100.00	100.00
232 Prior Administration Expenses	1,140.95	1,100.00	40.95	-40.95
233 Fees				
233.1 Banking/Investment Fees	12.00	35.00	-23.00	23.00
233.2 Online Payment Processing Fees	1,653.89	2,665.00	-1,011.11	1,011.11
233.3 ASCAP/BMI	318.00	300.00	18.00	-18.00
Total 233 Fees	1,983.89	3,000.00	-1,016.11	1,016.11
234 Ad Hoc/Liaisons Expenses		200.00	-200.00	200.00
235 Charity	2,691.22	1,500.00	1,191.22	-1,191.22
Total Expenses	\$52,695.27	\$77,150.00	\$ -24,454.73	\$24,454.73
NET OPERATING INCOME	\$16,903.21	\$0.00	\$16,903.21	\$ -16,903.21
NET INCOME	\$16,903.21	\$0.00	\$16,903.21	\$ -16,903.21

SCASFAA

Balance Sheet

As of April 6, 2022

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	
BB&T Checking	78,555.69
Edward Jones-Money Market	0.00
Wells Fargo Checking	0.00
Total Bank Accounts	\$78,555.69
Other Current Assets	
Edward Jones-LT 50/50	109,076.85
Edward Jones-ST 35/65	101,528.28
Total Other Current Assets	\$210,605.13
Total Current Assets	\$289,160.82
TOTAL ASSETS	\$289,160.82
LIABILITIES AND EQUITY	
Liabilities	
Total Liabilities	
Equity	
Opening Balance Equity	220,442.14
Retained Earnings	51,815.47
Net Income	16,903.21
Total Equity	\$289,160.82
TOTAL LIABILITIES AND EQUITY	\$289,160.82



	0-30 days	31-60 days	60-90 days	over 90 days	Total
Williams Chantea (University of South Carolina)		75.00			75.00
Ray Janice (Clafin University)				30.00	30.00
SandersGovan Tonya (Clafin University)				30.00	30.00
Moorer Keyscha (Clafin Universitys Office of Financial Aid)				30.00	30.00
Rivers Kizzy (Clafin University)				30.00	30.00
Smith Queen (Voorhees College)				30.00	30.00
Smith Mary (Anderson University)				30.00	30.00
Dempsey Amanda (OC Tech)				30.00	30.00
Dash Sonya (Orangeburg Calhoun Technical College)				30.00	30.00
Kearse Licinia W (Orangeburg Calhoun Technical College)				30.00	30.00
Griffith Jessica (Voorhees College)				30.00	30.00
Total		75.00		300.00	375.00



SCASFAA 2021-2022 Board Report

Date	04/07/2022
Committee	Treasurer-elect
Committee Chair	Regina Hailey Smith UofSC-Columbia
Vice-Chair	

Committee Member	Institution

Goals:

- Receive, post payments, and make deposits for SCASFAA Membership and Organization
- Assist with Quarterly Reconciliation Process
- Assist Treasurer as needed and learn Treasurer position processes to assume the role next year

Accomplishments:

- Checks and electronic transactions received through March 31, 2022, have been entered, posted and deposited.
- To date, Total volume AffiniPay (electronic) transactions \$43,410!
- First quarter and second quarter reports sent to Elizabeth. Third quarter completed and mailed 4/7/2022.
- Emailed Aging Receivables via Wild Apricot with Invoice attached reminders 4/7/2022. Currently 10 membership due individuals (\$300).



SCASFAA 2021-2022 Board Report

Date	April 7, 2022
Committee	Membership Committee
Committee Chair	Holly Gilliam

Committee Member	Institution
Kevin Perry	Coastal Carolina University
Kerstin Alston	York Technical College
Sul Black	Morris College
Jan Belton	VCom Osteopathic Medicine
Thomas Ard	FA Solutions

Goals:

1. To increase new membership utilizing:
 1. Phone calls
2. Encourage renewal of membership
 1. Phone calls
3. Palmetto Pages interviews of 3 members
4. Create Ad Campaign for 2022-2023 membership application

Accomplishments:

1. Called previous membership with no current membership to see about membership renewal.
2. Interviewed Chantea Williams (UofSC Columbia), Lou Parrot (Morris College) and Melissa Clark (HGTC) for Palmetto Pages.
3. Committee met 3/2/22 and 3/30/22 virtually to discuss the campaign to increase membership numbers. Committee members created ads to be emailed out to current members to renew July 1st and to invite their coworkers to join also.

- a. Also discussed creating incentives to have a monthly drawing for people that renew or join SCASFAA July 1st or later.

Note: Em McNair had resigned from the committee on 3/2/22. She thanked the committee for considering her for the committee.

Submitted by: Holly Gilliam



SCASFAA 2021-2022 Board Report

Date	3/30/2022
Committee	Legislative and CHE Relations
Committee Chair	Adam Ghiloni
Vice-Chair	

Committee Member	Institution
Joey Derrick	University of South Carolina
Ray jones	SC Loan Corp

Goals:

- Continued monitoring, assessments, and dissemination of federal and state legislative law and policy updates
- Enhancing partnerships and work with CHE on legislative and regulatory items

Accomplishments:

- Board approved merger of Legislative Relations and CHE Relations Committee and P&P changes
- Held Consensus Workshop at last board meeting to determine SCASFAA Priorities
- Held two quarterly meetings with CHE Staff – building relationships and engaging on a regular basis to work together in the administration of state aid
 - Determine SCASFAA “wants” for an integrated state scholarship portal – Adam will lead this
 - Plan to offer two sessions for CHE at our fall conference (general and a nuts & bolts session) – Missy to lead
 - Ask the membership who is willing to host summer residency and scholarship workshops – Missy to lead
- Continued monitoring of Federal budget, legislation, loan repayment, and communications
- Completed annual timeline for committee responsibilities/duties



Legislative and CHE
Timeline.docx



SCASFAA State
Legislative and Advoc

Submitted by: Adam Ghiloni



SCASFAA 2020-2021 Board Report

Date	04/07/2022
Committee	Business Partner Advisory
Committee Chair	Shannon Jones
Vice-Chair	Melanie Gillespie

Goals:

- To provide the business partners a voice to the SCASFAA Board
- To implement and vet ideas and suggestions to better the business partner experience
- To give the board an idea of what concerns the business partners may have and the struggles they have to engage

Accomplishments: (01/2022)

- Had a successful conference in the fall
- Vendors felt like they got their monies worth for the exposure that they had.
- Successful bingo activity to have attendees engage with vendors. (Another great production from Mrs. Gillespie!)

Accomplishments: (04/2022)

- Vendors continue to offer suggestions as value adds for future conference sponsorship (speed dating vendor style, conduct a “Director’s Summit” as a preconference event – allowing the highest tiered sponsors the benefit of attending while giving a short 10 minute presentation, allowing the vendors to moderate and introduce speakers.)
- Vendors continue to express their desire to be “in person” rather than having a virtual option

Submitted by: Shannon R. Jones



SCASFAA 2020-2021 Board Report

Date	04/11/22
Committee	Sponsorship
Committee Chair	Nicole Brownlow, Trident Technical College
Vice-Chair	

Committee Member	Institution
Melanie Gillespie	Tri-County Technical College
Kelly Savoie	Sallie Mae

Goals:

- Recruit and develop relationships with sponsors for 2021 Fall Conference
- Update Sponsorship P&P for upcoming transition meeting

Accomplishments:

Secured 18 sponsorships for 2021 Fall Conference, 16 attended the conference.

- 4 Tier – 1
- 11 Tier – 2
- 3 Non-Sponsor

All sponsors have paid.

All advertising has been completed.

Submitted by: Nicole Brownlow