



**South Carolina Association  
of  
Student Financial Aid Administrators**

Minutes

2022-2023 Executive Board Meeting

Thursday, January 26, 2023

Virtual (Microsoft Teams)

9:00 Pre-meeting: Jeff Stanley, Edward Jones

**Minutes**

President Missy Perry called the Executive Board Meeting to order at 9:38am. A quorum was present.

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

SASF AA Update

Annual Conference, Chattanooga, TN February 12-15, 2023

2022-2023 SASFAA Volunteers

- Zach Christian Membership Chair
- Jennifer Davis Electronic Services Chair
- Melanie Gillespie 2024 Conference Co-Chair/Conference Committee
- Joey Derrick Legislative Relations Committee
- Missy Perry Electronic Services Committee
- Carolyn Sparks Nominations and Elections/Awards
- Michael Spienza Sponsorship Committee
- Sarah Dowd Bylaws Committee

**Report of Officers:**

**President Missy Perry**

Report stands as submitted.

**Past-President/Long Range Plan Carolyn Sparks**

Unable to join but Missy gave updates. Working on slate of candidates Jan 13. [mention who is on that list]. Closes on February 2 at 3pm

**Vice President/ Professional Development Adam Ghiloni**

Report stands as submitted.

New and intermediate aid planning.

**President-Elect/Special Projects Zachary Christian**

Attending NASFAA leadership expo as president elect

Attending SASFAA conference and attending president elect sym.

Attending Kentucky conference as president elect

Meet with Representative Duncan and Graham in February in DC to advocate. Asking for input on topic. Adam (Pell Grants) Elizabeth (loan repayment simplification) Melanie (Pell and eliminate origination fees, particularly on PLUS Loans)

Looking to hold transition in Greenville sometime this summer.

**Secretary/By Laws**

**Danielle Rymer**

Report stands as submitted.

The minutes for the Executive Board Meeting from October 16, 2022 and eMeeting in November 15, 2022, was submitted to the Board by email on January 25, 2023, for comment and corrections. There are no questions or comments. The minutes have been approved and will be sent to the Electronic Services Chair to be added to the website.

Policy and Procedures question about Consumer Relations and Counselor Relations

Code 107.1 budget code scheme

207 Consumer Relations

215 Counselor Relations

Code 107.1 budget code scheme

218 Global Issues

Code number 100.4

2. The current President and the Chair of the Counselor Relations Committee of SCASFAA shall each receive a complimentary membership in CACRAO. [The "Counselor Relations" committee has merged with Financial Awareness.]

Code number 100.5

1. The Chair of the Counselor Relations Committee shall appoint a representative or representatives to act as presenters at the annual CACRAO Guidance Counselors Workshops for his/her upcoming term of office. The representative(s) must be an Active member(s) of the association.
2. Representatives shall serve actively for one year as members of the Counselor Relations Committee with no prohibition or limit on the number of years one could serve.

[The "Counselor Relations" committee has merged with Financial Awareness.]

Code 114.2 C and D (Financial Awareness)

Code 114.2 H (Communications Committee)

Code 114.2 R Diversity, Equity, and Inclusion Committee - confirm the goals have not updated

Code 110.1 (Elections: Procedures) updated but may want to consider updating 109.1 (Nominations: Policies & Procedures)

Code 109.1 Nominations

Code 109.2

**Treasurer/Budget**

**Regina Hailey-Smith**

Report stands as submitted.

Budgets should be up to date. Question budget for QuickBooks put under fees and asked for

**Treasurer-Elect**

**Michelle Upchurch**

Updating report?

Aging receivables \$670

**Member at Large/Membership**

**Jernitha Smith**

Report stands as submitted.

390 contacts in "wild apricot/personify" 356 active members

Wants to merge volunteerism and membership codes with member-at-large

**Committee Reports:**

**Communications**

**Tosh Greathree**

Report stands as submitted.

Suggests that access be given to social media accounts to Communication Chair at the start of the year.

**Electronic Services**

**Kyle Wade**

Updated minutes, committees, names, P&P

**Financial Awareness**

**Nicole Brownlow**

No report. Not present. Webinar upcoming.

**Financial Planning**

**Elizabeth Milam**

Financial review no report yet until

**Diversity, Equity, and Inclusion**

**Holly Gilliam/Kala Hudson**

Report stands as submitted.

**Legislative Relations**

**Joey Derrick**

Report stands as submitted.

Crediting lobbyists and gave update on bills moving through the legislature. Meeting with SASFAA and says that the Legislative committee is particularly active this year.

NASFAA pipeline to help with advocacy attended two meetings

**Loan Agency Liaison**

**Ray Jones**

Report stands as submitted.

Supreme Court decision in FEBRUARY. Postponement of payment 60 days after decision or 60 days after June 30.

**Conference**

**Sarah Dowd**

Thanks everyone for support. Sent assessment. Had 15% response rate. Unsatisfied: FAFSA Simplification session was in too small of a room.

**Site Selection**

**Bridget Blackwell**

Report stands as submitted.

**Sponsorship**

**Melanie Gillespie**

Spoke with vendors at conference about gatherings and enjoyed the more casual atmosphere. Working to incorporate something different for the future conference. Not looking to increase rate for vendor sponsors

**New Business**

No new business.

**Old Business,**

No old business.

**Announcements and Closing Remarks**

None.

Meeting adjourned at 10:50

Respectfully Submitted,

*Danielle Rymer*

Danielle Rymer

2022-23 SCASFAA Secretary

Approved by the Executive Board on April 27,2023.



## SCASFAA 2022-23 Board Report

<b>Date</b>	1/25/2023
<b>Committee</b>	President
<b>Committee Chair</b>	Missy Perry
<b>Vice-Chair</b>	
<b>Committee Member(s) (Name / Institution)</b>	Missy Perry, Piedmont Technical College
<b>Report Submitted By:</b>	Missy Perry

### Goals:

To continue the history and strength of SCASFAA by providing professional 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.

### Accomplishments:

1. The 2022-2023 SCASFAA Budget was approved in July via e-meeting.
2. Attended the First SASFAA Board meeting on July 27-28 (virtual)
3. Attended second SASFAA Board meeting on October 8, 2022 in Chatanooga, TN
4. Successful 2022 Conference in October.

### SASFAA Notes:

The annual SASFAA Conference will be held on February 12-15 in Chatanooga, TN.



## SCASFAA 2022-23 Board Report

<b>Date</b>	1/26/2023
<b>Committee</b>	VP-Professional Development
<b>Committee Chair</b>	Adam Ghiloni
<b>Vice-Chair</b>	
<b>Committee Member(s) (Name / Institution)</b>	JW Kellam – Converse
	Dana Quattlebaum – Benedict
	Melanie Gillespie – Tri-Count Tech
	Concepta Williamson – Citizens Bank
	Sam Hicks – Costal Carolina
	Angelia Williams – Midlands Tech
	Terria Williams – Claflin
	Holly Gilliam – UofSC Columbia
	Jennifer Williams - Clemson
	Lorraine Fleetwood – UofSC Columbia
<b>Report Submitted By:</b>	Adam Ghiloni

### Goals:

- Plan and deliver prescheduled professional development calendar
  - Plan and execute New/Int Aid Workshop
  - Plan and execute Leadership Symposium
  - Plan and execute remaining 4 webinar offerings



## Accomplishments:

- Delivered new innovative pre-conference and general key note speaker for the annual conference
- Supported and helped present several sessions for the conference committee
- New/Int Aid Workshop – schedule is finalized, working through final planning and event details with sub-committee
- Leadership Symposium – Theme is “Rising Stars” Sessions will be focused and designed as small group conversations to support our young professionals and rising stars for a future career in higher level financial aid leadership

## Event Registrations as of 1/23/23

- September 22<sup>nd</sup> 10am-11am – [Legislative & CHE Relations Update \(Webinar\)](#) – 38 Registrants
- November 9<sup>th</sup> 10am-Noon – [Diversity, Equity, and Inclusion \(Webinar\)](#) – 20 Registrants
- January 31<sup>st</sup> 10am-11am – [Financial Awareness \(Webinar\)](#) – 24 registrants
- February 23<sup>rd</sup> 9am-10am – [Beyond Exit Counseling: Decoding the Fine Print for Students \(Webinar\)](#) - 12 Registrants
- March 14<sup>th</sup> and 15<sup>th</sup> – [New and Intermediate Aid Workshop \(Midlands Technical College, Harbison Campus\)](#), registration fee \$75 – 18 Registrants
- March 29<sup>th</sup> 2pm-3pm - [Gen Z: it's a VIBE: How we connect with a new generation of students \(Webinar\)](#) - 9 Registrants
- April 19<sup>th</sup> 10am-11am – [Membership, Volunteering, and Involvement in SCASFAA \(Webinar\)](#)
- - 5 Registrants
- April 25<sup>th</sup> 10am-3pm – [Leadership Symposium Summit](#) (Claflin University), registration fee \$25 – 3 Registrants



## SCASFAA 2022-23 Board Report

<b>Date</b>	1/24/2023
<b>Committee</b>	Membership & Volunteerism
<b>Committee Chair</b>	Jernitha S. Smith
<b>Vice-Chair</b>	
<b>Committee Member(s) (Name / Institution)</b>	Melissa Barnette-Furman University
	Jan Belton- Edward College of Osteopathic Medicine
	Holly Gilliam- University of South Carolina, Columbia
	J.W. Kellam- Converse College
	Darby Tippit- Spartanburg Methodist College
<b>Report Submitted By:</b>	Jernitha S. Smith

### Goals:

- Complete initiative to merge Membership & Volunteerism content.
- Provide incentive to inactive schools to attend a SCASFAA event, i.e., Registration comp.

### Accomplishments:

1. Increased activity of previously SCASFAA inactive schools at the 2022-2023 SCASFAA conference.



## SCASFAA 2022-23 Board Report

<b>Date</b>	01/24/2023	
<b>Committee</b>	Budget Committee	
<b>Committee Chair</b>	Regina Hailey Smith, USC TRIO	
<b>Vice-Chair</b>	Michelle Upchurch, Limestone College	
<b>Committee Member(s) (Name / Institution)</b>	Missy Perry, Piedmont Tech.	Melanie Gillespie, Tri-County Tech
	Zach Christian, SCTG.	Adam Ghiloni, Tri-County Tech
	Carolyn Sparks, Wofford	
	Elizabeth Milam, Clemson	
	Sarah Dowd, Trident Tech	
<b>Report Submitted By:</b>	Regina Hailey Smith	

### Goals:

- Reconcile Bank Accounts
- Provide current budget report at Executive Board Meeting
- Respond to any findings/suggestions from the Financial Planning Committee
- Update the Financial Planning Guide

### Accomplishments:

- October-December Financials (Q2) Reconciled
- SCASFAA Tax Forms Completed in November as required electronically
- Working on a few suggestions for the Financial Planning Guide for transition

### Included in Report Fiscal Year to Date (1/24/2023):

- Budgets vs Actuals
- Balance Sheet
- Aging Receivables

# SCASFAA

## Balance Sheet

As of January 24, 2023

	TOTAL
<b>ASSETS</b>	
Current Assets	
Bank Accounts	
Edward Jones-Money Market	690.00
Truist Checking	86,604.79
Wells Fargo Checking	0.00
<b>Total Bank Accounts</b>	<b>\$87,294.79</b>
Other Current Assets	
Edward Jones-LT 50/50	114,433.84
Edward Jones-ST 35/65	104,084.48
<b>Total Other Current Assets</b>	<b>\$218,518.32</b>
<b>Total Current Assets</b>	<b>\$305,813.11</b>
<b>TOTAL ASSETS</b>	<b>\$305,813.11</b>
<b>LIABILITIES AND EQUITY</b>	
Liabilities	
<b>Total Liabilities</b>	
Equity	
Opening Balance Equity	220,442.14
Retained Earnings	72,984.83
Net Income	12,386.14
<b>Total Equity</b>	<b>\$305,813.11</b>
<b>TOTAL LIABILITIES AND EQUITY</b>	<b>\$305,813.11</b>

# SCASFAA

## Budget vs. Actuals: SCASFAA 2022-2023 - FY23 P&L

July 2022 - June 2023

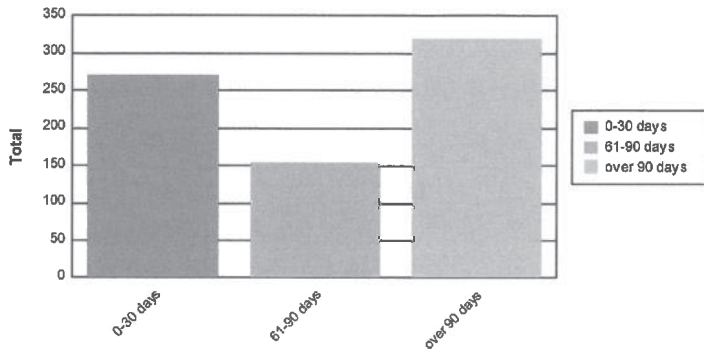
	TOTAL					
	ACTUAL	BUDGET	OVER BUDGET	REMAINING	% OF BUDGET	% REMAINING
<b>Income</b>						
003 Contingency/Transfer of Assets		16,720.00	-16,720.00	16,720.00		100.00 %
005 Other Income	7.00	100.00	-93.00	93.00	7.00 %	93.00 %
007 Charity Income	2,824.00	1,000.00	1,824.00	-1,824.00	282.40 %	-182.40 %
020 Membership Dues	930.00	10,200.00	-9,270.00	9,270.00	9.12 %	90.88 %
020.1 CY Membership	9,390.00		9,390.00	-9,390.00		
<b>Total 020 Membership Dues</b>	<b>10,320.00</b>	<b>10,200.00</b>	<b>120.00</b>	<b>-120.00</b>	<b>101.18 %</b>	<b>-1.18 %</b>
030 Fall Conference	3,655.00	25,000.00	-21,345.00	21,345.00	14.62 %	85.38 %
030.1 CY Conference	30,420.00		30,420.00	-30,420.00		
<b>Total 030 Fall Conference</b>	<b>34,075.00</b>	<b>25,000.00</b>	<b>9,075.00</b>	<b>-9,075.00</b>	<b>136.30 %</b>	<b>-36.30 %</b>
<b>050 Professional Development Income</b>						
050.1 New Aid Officers' Workshop	600.00	800.00	-200.00	200.00	75.00 %	25.00 %
050.7 Other Workshops	875.00	800.00	75.00	-75.00	109.38 %	-9.38 %
<b>Total 050 Professional Development Income</b>	<b>1,475.00</b>	<b>1,600.00</b>	<b>-125.00</b>	<b>125.00</b>	<b>92.19 %</b>	<b>7.81 %</b>
<b>070 Sponsorships</b>						
070.1 Conference	19,300.00	30,000.00	-10,700.00	10,700.00	64.33 %	35.67 %
<b>Total 070 Sponsorships</b>	<b>19,300.00</b>	<b>30,000.00</b>	<b>-10,700.00</b>	<b>10,700.00</b>	<b>64.33 %</b>	<b>35.67 %</b>
<b>080 Interest</b>						
080.1 Checking	4.84		4.84	-4.84		
<b>Total 080 Interest</b>	<b>4.84</b>		<b>4.84</b>	<b>-4.84</b>		
<b>083 Dividends Earned</b>						
083.1 Edward Jones-ST 35/65	520.19	2,500.00	-2,500.00	2,500.00		100.00 %
083.2 Edward Jones-LT 50/50	128.11		128.11	-128.11		
<b>Total 083 Dividends Earned</b>	<b>648.30</b>	<b>2,500.00</b>	<b>-1,851.70</b>	<b>1,851.70</b>	<b>25.93 %</b>	<b>74.07 %</b>
085 Capital Gains		3,000.00	-3,000.00	3,000.00		100.00 %
<b>Total Income</b>	<b>\$68,654.14</b>	<b>\$90,120.00</b>	<b>\$ -21,465.86</b>	<b>\$21,465.86</b>	<b>76.18 %</b>	<b>23.82 %</b>
<b>GROSS PROFIT</b>	<b>\$68,654.14</b>	<b>\$90,120.00</b>	<b>\$ -21,465.86</b>	<b>\$21,465.86</b>	<b>76.18 %</b>	<b>23.82 %</b>
<b>Expenses</b>						
101 President	2,236.70	4,000.00	-1,763.30	1,763.30	55.92 %	44.08 %
102 President-Elect	192.72	6,000.00	-5,807.28	5,807.28	3.21 %	96.79 %
102A Travel	2,584.65		2,584.65	-2,584.65		
<b>Total 102 President-Elect</b>	<b>2,777.37</b>	<b>6,000.00</b>	<b>-3,222.63</b>	<b>3,222.63</b>	<b>46.29 %</b>	<b>53.71 %</b>
103 Vice-President		100.00	-100.00	100.00		100.00 %
104 Secretary		100.00	-100.00	100.00		100.00 %
105 Treasurer	119.61	1,400.00	-1,280.39	1,280.39	8.54 %	91.46 %
105B Supplies	112.25		112.25	-112.25		
<b>Total 105 Treasurer</b>	<b>231.86</b>	<b>1,400.00</b>	<b>-1,168.14</b>	<b>1,168.14</b>	<b>16.56 %</b>	<b>83.44 %</b>
106 Member at Large		200.00	-200.00	200.00		100.00 %
107 Treasurer-Elect		100.00	-100.00	100.00		100.00 %
201 Membership Committee	150.75	300.00	-149.25	149.25	50.25 %	49.75 %
202 Communications		100.00	-100.00	100.00		100.00 %
203 Program-Fall Conference	33,014.98	42,500.00	-9,485.02	9,485.02	77.68 %	22.32 %
203B Supplies	1,368.05		1,368.05	-1,368.05		

# SCASFAA

## Budget vs. Actuals: SCASFAA 2022-2023 - FY23 P&L

July 2022 - June 2023

	TOTAL					
	ACTUAL	BUDGET	OVER BUDGET	REMAINING	% OF BUDGET	% REMAINING
203F Meeting	4,125.00	8,250.00	-4,125.00	4,125.00	50.00 %	50.00 %
<b>Total 203 Program-Fall Conference</b>	<b>38,508.03</b>	<b>50,750.00</b>	<b>-12,241.97</b>	<b>12,241.97</b>	<b>75.88 %</b>	<b>24.12 %</b>
205 Nominations & Elections	29.00	100.00	-71.00	71.00	29.00 %	71.00 %
206 Legislative Relations		1,000.00	-1,000.00	1,000.00		100.00 %
207 Consumer Relations		600.00	-600.00	600.00		100.00 %
208 President's Contingency		1,000.00	-1,000.00	1,000.00		100.00 %
209 Miscellaneous	89.95	500.00	-410.05	410.05	17.99 %	82.01 %
213 Professional Development	1,000.00		1,000.00	-1,000.00		
213.1 New Aid Officers' Workshop		2,175.00	-2,175.00	2,175.00		100.00 %
213.7 Other Workshops		2,195.00	-2,195.00	2,195.00		100.00 %
<b>Total 213 Professional Development</b>	<b>1,000.00</b>	<b>4,370.00</b>	<b>-3,370.00</b>	<b>3,370.00</b>	<b>22.88 %</b>	<b>77.12 %</b>
213.8 Charles Witten Professional Development Fellowship		200.00	-200.00	200.00		100.00 %
218 Global Issues		100.00	-100.00	100.00		100.00 %
221 Long Range Planning		100.00	-100.00	100.00		100.00 %
222 Sponsorship	400.00	700.00	-300.00	300.00	57.14 %	42.86 %
224 Site Selection		100.00	-100.00	100.00		100.00 %
225 Special Projects		600.00	-600.00	600.00		100.00 %
226 Executive Board						
226.1 Transitional Board Meeting		5,000.00	-5,000.00	5,000.00		100.00 %
226.2 Board Meetings		1,000.00	-1,000.00	1,000.00		100.00 %
<b>Total 226 Executive Board</b>		<b>6,000.00</b>	<b>-6,000.00</b>	<b>6,000.00</b>		<b>100.00 %</b>
227 Insurance & Bonding	387.00	800.00	-413.00	413.00	48.38 %	51.63 %
228 Electronic Services	2,544.00	3,000.00	-456.00	456.00	84.80 %	15.20 %
228B Supplies	11.10		11.10	-11.10		
<b>Total 228 Electronic Services</b>	<b>2,555.10</b>	<b>3,000.00</b>	<b>-444.90</b>	<b>444.90</b>	<b>85.17 %</b>	<b>14.83 %</b>
229 Scholarship Awards	2,000.00	2,000.00	0.00	0.00	100.00 %	0.00 %
230 Advisory Committee to CHE		100.00	-100.00	100.00		100.00 %
232 Prior Administration Expenses		1,100.00	-1,100.00	1,100.00		100.00 %
233 Fees	1,117.30		1,117.30	-1,117.30		
233.1 Banking/Investment Fees		35.00	-35.00	35.00		100.00 %
233.2 Online Payment Processing Fees	1,464.94	2,665.00	-1,200.06	1,200.06	54.97 %	45.03 %
233.3 ASCAP/BMI		300.00	-300.00	300.00		100.00 %
<b>Total 233 Fees</b>	<b>2,582.24</b>	<b>3,000.00</b>	<b>-417.76</b>	<b>417.76</b>	<b>86.07 %</b>	<b>13.93 %</b>
234 Ad Hoc/Liaisons Expenses		200.00	-200.00	200.00		100.00 %
235 Charity	3,320.00	1,500.00	1,820.00	-1,820.00	221.33 %	-121.33 %
<b>Total Expenses</b>	<b>\$56,268.00</b>	<b>\$90,120.00</b>	<b>\$ -33,852.00</b>	<b>\$33,852.00</b>	<b>62.44 %</b>	<b>37.56 %</b>
<b>NET OPERATING INCOME</b>	<b>\$12,386.14</b>	<b>\$0.00</b>	<b>\$12,386.14</b>	<b>\$ - 12,386.14</b>	<b>0.00%</b>	<b>0.00%</b>
<b>NET INCOME</b>	<b>\$12,386.14</b>	<b>\$0.00</b>	<b>\$12,386.14</b>	<b>\$ - 12,386.14</b>	<b>0.00%</b>	<b>0.00%</b>



	0-30 days	31-60 days	60-90 days	over 90 days	Total
<u>Capers Destra (SC Student Loan Corporation)</u>	75.00				75.00
<u>Suttles Tonia (Spartanburg Community College)</u>	75.00				75.00
<u>Seale Christina (South Carolina Commission on Higher Education)</u>			75.00		75.00
<u>Gilliard Sylvia (Trident Technical College Talent Search)</u>			50.00		50.00
<u>Duncan Chevalier (Piedmont Technical College)</u>				50.00	50.00
<u>Hill Jennifer (Piedmont Technical College)</u>	30.00				30.00
<u>Vereen Wanda (Horry Georgetown Technical College)</u>	30.00				30.00
<u>Jones Shannon (Trident Technical College)</u>	30.00				30.00
<u>Demery Kira (SC Higher Education Tuition Grants Commission)</u>	30.00				30.00
<u>Brown Lakischa (York Technical College)</u>			30.00		30.00
<u>Patterson Cindi (North Greenville University)</u>				30.00	30.00
<u>McLeod Loretta (Voorhees University)</u>				30.00	30.00
<u>Kirkland Jillian (Technical College of the Lowcountry)</u>				30.00	30.00
<u>Tyus Jermine (York Technical College)</u>				30.00	30.00
<u>Kearse Licinia W (Orangeburg Calhoun Technical College)</u>				30.00	30.00
<u>Dempsey Amanda (OC Tech)</u>				30.00	30.00
<u>Eason Marilyn (Allen University)</u>				30.00	30.00
<u>Johnson Yolanda (yjohnsonallenuniversity.edu)</u>				30.00	30.00
<u>Lomax John (Allen University)</u>				30.00	30.00
<b>Total :</b>	<b>270.00</b>		<b>155.00</b>	<b>320.00</b>	<b>745.00</b>



## SCASFAA 2022-23 Board Report

<b>Date</b>	1/24/2023
<b>Committee</b>	Secretary and By-laws
<b>Committee Chair</b>	Danielle Rymer
<b>Vice-Chair</b>	
<b>Committee Member(s) (Name / Institution)</b>	
<b>Report Submitted By:</b>	Danielle Rymer

### Goals:

1. Professionally represent SCASFAA by ensuring the by-laws are updated based on recommendations and followed to the best of our ability
2. Review minutes and make sure the Policy and Procedures remains up-to-date.
3. Make timely recommendations to the Executive Board concerning revisions to the P&P.
4. Make timely recommendations to the Executive Board concerning amendments to the Associations by-laws.

### Accomplishments:

1. **Updated minutes for the following meetings and submitted to Electronic Services Committee for website:**
  - a. **June 2022 Transition Meeting**
  - b. **July 2022 eMeeting**
  - c. **Draft October 2022 Executive Board Meeting**
  - d. **Draft October 2022 Annual Business Meeting**
  - e. **Draft November 2022 Executive Board eMeeting**



2. Updated Policy and Procedures to correct typos and formatting issues. Updated based on meeting minutes.
3. Working on a short list of suggestions for updates based on the P&P review to be included in April meeting.



## SCASFAA 2022-23 Board Report

<b>Date</b>	1/19/2023
<b>Committee</b>	Treasurer Elect
<b>Committee Chair</b>	Michelle Upchurch
<b>Vice-Chair</b>	
<b>Committee Member(s) (Name / Institution)</b>	Regina Hailey-Smith/ USC Trio
<b>Report Submitted By:</b>	Michelle Upchurch

### Goals:

To collect all past due invoices.

We currently have 19 invoices - \$745, listed on the Aging Receivables Report.

0-30	\$240
31-60	\$ 0
60-90	\$155
Over 90	<u>\$350</u>
Total	\$745

I have been sending past due notices 1-2 times a month to those that are 31-over 90 days past due.

2nd quarter documents were mailed to Elizabeth January 12, 2023.



## SCASFAA 2022-23 Board Report

<b>Date</b>	1/19/2023
<b>Committee</b>	Communication
<b>Committee Chair</b>	Tosh Greathree/ Columbia College
<b>Vice-Chair</b>	
<b>Committee Member(s) (Name / Institution)</b>	Melissa Barnette/ Furman
<b>Report Submitted By:</b>	Tosh Greathree

### Goals:

Conference program, along with capturing testimonies and pictures of the 22-23 conference.

### Accomplishments:

- Captured pictures during the conference to have added to social media.
- Completed the program.



## SCASFAA 2022-23 Board Report

<b>Date</b>	January 24, 2023
<b>Committee</b>	Conference Committee
<b>Committee Chair</b>	Sarah Dowd / Trident Technical College
<b>Vice-Chair</b>	
<b>Committee Member(s) (Name / Institution)</b>	Nicole Brownlow / Trident Technical College
	Zachary Christian / SC Tuition Grants Commission
	Adam Ghiloni / Tri-County Technical College
	Melanie Gillespie / Tri-County Technical College
	Holly Gilliam / University of SC - Columbia
	Tosh Greathree / Columbia College
	Regina Hailey Smith / University of SC - Columbia
	Nikisha Howze / York Technical College
	Kala Hudson / Converse University
	Jessie Kiser / Clemson University
	Gena Miles / SC Tuition Grants Commission
	Diana O'Bryan / Bob Jones University
	Missy Perry / Piedmont Technical College
<b>Report Submitted By:</b>	Sarah Dowd / Trident Technical College

### Goals:

Build and present annual conference with member opportunities for

- increasing professional knowledge, networking, and association involvement,
- building cooperative vendor/sponsor relationships,
- charitable donations and awareness,
- fun

**Accomplishments:**

Worked cooperatively with other board members and committee members for

- sessions
- presenters
- moderators
- events
- catering
- registration
- decorations
- AV support
- Program
- Website
- Guest Speakers
- Gifts

Held Conference with success

Completed conference evaluation with overall excellent and successful evaluation from approximately 15% of attendees submitting.

Post conference review of billing and payment is complete

Received inquiry from KASFAA regarding our Opening Session speaker and forwarded information with positive recommendation.

HUGE thanks to everyone who worked, participated and gave advice.

**Next Steps:**

We have received inquiries from retired members asking about attending in 2023.



## SCASFAA 2022-23 Board Report

<b>Date</b>	01/24/2023
<b>Committee</b>	Diversity, Equity and Inclusion Committee
<b>Committee Co-Chair</b>	Holly Gilliam, University of South Carolina Columbia
<b>Committee Co-Chair</b>	Kala Hudson, Converse College
<b>Committee Member(s) (Name / Institution)</b>	Casey Bolin, University of South Carolina Upstate
	Zachary Christian, SCTG
	Gerrick Hampton, SC CHE
	Dana Quattlebaum, Benedict College
	Jernitha Smith, University of South Carolina Sumter
<b>Report Submitted By:</b>	Holly Gilliam

### Goals:

1. DEI sessions at the SCASFAA Conference, Fall 2022 (complete)
2. Update committee description on SCASFAA website
3. Professional Development Webinar (complete)
4. DEI article webinar series (ongoing)
5. Review and update P & P for Global Issues to suggest updates for the executive board
6. New Aid/Intermediate Professional Development Session (upcoming)
7. Professional Development Leadership Session (upcoming)

### Accomplishments:

1. Conference sessions
  - a. Viva Diversity, Equity & Inclusion
    - i. Good response
  - b. Hidden Bias

- i. Well attended
  - c. FAO as Allies: Understanding and Supporting the LGBTQIA+ Community
    - i. Well attended
  - d. DEI breakfast meet and greet
    - i. Not very well attended
- 2. Website: Suggestions were made by the committee, and this is an ongoing process.
- 3. Nov 9<sup>th</sup> webinar for Recovery Ally
  - a. Well attended with the focus on helping students in Recovery for Substance abuse
- 4. Like book club but for articles done as a virtual meeting to talk about recent articles focused on DEI. This will be an ongoing, developing project.
  - a. Will set up a committee meeting to select articles and set up session, by late March.
- 5. Not started yet
- 6. DEI speaker booked for New Aid/Intermediate Training
- 7. Not yet started.



## SCASFAA 2022-23 Board Report

<b>Date</b>	1/26/2023
<b>Committee</b>	Legislative Relations Committee
<b>Committee Chair</b>	Joey Derrick
<b>Vice-Chair</b>	
<b>Committee Member(s) (Name / Institution)</b>	Joey Derrick - USC-Columbia
	Adam Ghiloni
	Ray Jones - SCLSC
	Samantha Hicks - Coastal Carolina University
	Katie Harrison - SC Higher Education Tuition Grants Commission
<b>Report Submitted By:</b>	Joey Derrick

### Goals:

1. Keep SCASFAA membership informed of relevant state and federal legislation
2. Represent SCASFAA on SASFAA Legislative Relations Committee
3. Represent SCASFAA in appropriate advocacy efforts
4. Hold quarterly meetings with CHE staff.

### Accomplishments:

- Membership confirmed
- Held SCASFAA legislative update webinar
- Held quarterly meetings with CHE staff
- Participated in recurring SASFAA Legislative Relations Committee meeting
- Participated in the recurring meetings of NASFAA's new State Advocacy Network
- Distributed list of pre-filed bills from 125th Session of SC General Assembly to membership





## SCASFAA 2022-23 Board Report

<b>Date</b>	1/26/2023
<b>Committee</b>	Lender Liaison
<b>Committee Co-Chair</b>	Ray Jones SC Student Loan
<b>Committee Co-Chair</b>	
<b>Committee Member(s) (Name / Institution)</b>	
<b>Report Submitted By:</b>	Ray Jones

### Goals:

To provide comprehensive guidance regarding news and guidelines pertaining to loans and other areas of concern by lenders and servicers.

### Updates:

Lender/servicer concerns with the following:

- New Income-Driven Plan and impact on student loan repayment/consolidation
- Federal loan forgiveness outcome is at the supreme court
  - Decision scheduled by 2/28/23
- Direct Loan payment and interest pause continued extensions and will be dependent on the Supreme Court decision above



## SCASFAA 2022-23 Board Report

<b>Date</b>	1/26/2023
<b>Committee</b>	Site Selection
<b>Committee Chair</b>	Bridget D. Blackwell- USC Regional Palmetto College
<b>Vice-Chair</b>	
<b>Committee Member(s) (Name / Institution)</b>	Elizabeth Milam- Clemson University
	Darby Tippit- Spartanburg Methodist College
	Concepta Williamson- Citizens
<b>Report Submitted By:</b>	Bridget D. Blackwell

### Goals:

Complete a Request for Proposal and make a recommendation for the Fall 2024 conference site.

### Accomplishments:

- Committee met in October to discuss the goals and objectives of the committee.
- Reviewed the site selection checklist and provided recommendations as needed.
- Plan to meet in early February and submit request for a proposal.
- Plan to have a proposal to the board by the April board meeting.