

South Carolina Association of Student Financial Aid Administrators



2018-19 Executive Board Meeting
Friday, March 29, 2019
SC Student Loan
Columbia, SC

Present

Kisha Howze
Bridget Blackwell
Zachary Christian
Joey Derrick
Angela Fowler
Melanie Gillespie
Samantha Hicks
Ray Jones
JW Kellam

Earl Mayo
Elizabeth Milam
Nikki Miller
Missy Perry
Justin Pichey
Kelly Savoie
Traci Singleton
DJ Wetzel
Jennifer Williams

Meeting

President Howze called the 2018-19 Executive Board Meeting to order at 10:08 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. Elizabeth Milam motioned to approve the agenda and Angela Fowler seconded the motion, which carried.

Action Item: Approval of November 2018 Meeting Minutes. Jennifer Williams moved to approve the minutes and Justin Pichey seconded the motion, which carried.

There was no old business to report.

Report of Officers

Kisha Howze – President

President Howze discussed the Annual SASFAA conference, which took place in Atlanta, GA in February. SCASFAA board member, Samantha Hicks, and member Miracle Mosley represented SCASFAA at the SASFAA Leadership Symposium. President Howze reported that Melanie Gillespie, President-Elect, will be attending the NCASFAA conference April 6th-10th as part of the President's Exchange. President Howze also reported that the SASFAA NAOW will take place at Wofford College, in Spartanburg, again this summer. Lastly, the SASFAA Transitional Board meeting will be June 9th-12th in Florida. She will roll off the SASFAA Board as Melanie transitions on as the 2019-2020 SCASFAA President.

Jennifer Williams – Past-President and Nominations and Elections

Jennifer thanked the members of the Nominations and Elections Committee for their work this year. While the process was much different in regard to how the elections took place, it worked out and she feels it went well. Jennifer reported 128 members voted and SCASFAA will be in great hands with the future leaders. Traci Singleton was elected to serve as President-Elect, Bridget Blackwell was elected to serve as Vice President, Samantha Hicks was elected to serve as Treasurer-Elect, and Melissa Barnette was elected to serve as Member-at-Large. Jennifer thanked all for their willingness to run, and thanked Justin Pichey for his work and assistance with getting the website updated and ready for voting.

Zachary Christian moved to destroy the results of the ballot; Kisha Howze seconded the motion, which carried.

DJ Wetzel – Vice President and Professional Development

Not Present; Report attached.

Melanie Gillespie reported, on DJ's behalf, of the success of the New Aid and Intermediate Officer Workshop, which took place March 4th in Newberry.

Melanie Gillespie – President-Elect and Special Projects

Melanie announced that she is still in need of Transition Guides. She is requesting that all board members submit those to her by May. On the transition guide, she wants specific duties broken down by month, so they can be used to show future volunteers exactly what is expected and the time commitment. Melanie also reminded the Board that Transition will take place June 17th and 18th at Piedmont Technical College – Newberry Campus. To save money, it will be close enough for most to not have to stay in the hotel. Melanie announced her support of Samantha Hicks' proposal for Vice Chairs and the LEAD program, which will be discussed as part of her report.

Zachary Christian – Secretary and By-Laws

Zachary announced that all previous Board Meeting minutes for the year, and the Annual Business Meeting Minutes have been posted to the website.

Discussion – Award Nomination Deadline: The By-Laws committee recommended a change to the verbiage of the P&P regarding the deadline of submission of award nominations (verbiage in attached report). Zach moved to accept the new verbiage and update the P&P; the motion carried.

Discussion – SCASFAA Permanent Address Change: Zach reminded the Board that the permanent address of the Association is currently the SC Higher Education Tuition Grants Commission. Zach announced that the Commission will be relocating to a new office on the other side of town in July, which would require a vote to change the address in the P&P during the transitional period. The By-Laws committee recommended a change to the verbiage, allowing the SCASFAA Secretary the authority to update the Address in the P&P when the Tuition Grants Commission's address changes, until further action from the Board is taken to revoke that authority (verbiage in attached report). Zach moved to accept the verbiage and update the P&P; the motion carried.

Discussion – Time Frame of Awards: Zach brought up a concern regarding the time-frame cap on the SCASFAA Emerging Leader and Achiever awards; His concern is that deserving members are missing out on the opportunity to be recognized for going above and beyond because of the current constraints. He suggested increasing the maximum number of years for the Emerging Leader Award to 10 years, from the current 7, and either increasing the maximum number of years of the Achiever Award to 30 years, or removing the cap. Elizabeth, Jennifer, and Earl Mayo offered their support in removing the timeframe cap of the awards in general, leaving the awarding up to the discretion of the Executive Board who would be able to make the distinction of who would be an “emerging leader” versus “achiever”. Joey Derrick explained that a professional development program at USC had a similar situation and that it improved once the time cap was removed. Zach moved to remove the time caps on both the Emerging Leader and SCASFAA Achiever Awards. Elizabeth Milam seconded, and the motion carried.

Angela Fowler – Treasurer

Angela provided an update on SCASFAA Finances (attached). Angela reported that the checking account balance were too low, and funds had to be transferred from investments; she explained that this was expected and was not a surprise occurrence.

Missy Perry – Treasurer-Elect

Missy reported that there is \$495 in aging receivables; one of which is an unpaid conference registration for a member who did not attend the conference but had not cancelled before the refund deadline, and 10 are from unpaid memberships. Samantha asked if members are notified that they will still be responsible for payment of conference fees if they do not cancel and do not attend. Missy explained that it is listed on the registration website, on the invoice, and that she emailed all members with unpaid conference registrations a week prior to the refund deadline.

Gerrick Hampton – Member at Large

Not present; No report submitted.

Committee Reports

Ashley Stuckey – Advisory to CHE

Not Present; No report submitted

Michelle Upchurch – Communications

Michelle reminded everyone that the most recent issue of the Palmetto Pages newsletter was released on February 14th; the Summer edition will be out in early-mid June. Full report attached.

Kelly Savoie – Consumer/Counselor Relations

Kelly discussed the Debt Notification webinar, which took place in February; there were 28 participants and the webinar had great feedback. Kelly thanked USC-Columbia for spearheading the webinar. Kelly also reminded everyone that Money Smart week is approaching; she will continue to share events taking place with the membership via the List Serv. Elizabeth encouraged everyone to be on the lookout for one of Clemson’s events – Clemson Financial Aid Reads Mean Tweets.

Justin Pichey – Electronic Services

Justin reported that he is continuing to make updates to the website as requested. He also announced that he cleaned out old job postings from the Job Openings page.

Earl Mayo – Financial Planning

Earl provided a copy of the Q2 review. Earl stated that one item needs to be fixed, but that he will be working with Angela and Missy to get that updated. Earl also explained that the \$18,000 had to be moved from investments to the checking account, as Angela stated in her report, which is more than anticipated in the budget, but that it is the first time in over 3 years that money had to be drawn out of investments. Earl reported that currently there is a little more than \$200,000 in investments.

Traci Singleton – Global Issues

Traci reported that the Global Issues committee is working on an article related to domestic violence to be included in the next issue of the Palmetto Pages newsletter. Full report attached.

Joey Derrick – Legislative Relations

Joey reported that a lot is going on in regard to higher education on both the state and federal level. The Legislative Relations committee is working on writing a summary of all the important pieces of legislation currently being discussed to send out to the membership. Joey reported that he and the committee are trying to gauge at what point SCASFAA may want and/or need to take a position on some of the pieces currently being discussed. He explained that if he feels that is necessary with any of the proposed legislation, he will draft something and send for Board approval. He will continue to notify the membership via the List Serv of important items to take note of.

Ray Jones – Loan Agency Liaison

Ray informed the Board to keep an eye out on the legislation that may be coming out regarding debt and college affordability. Ray also encouraged everyone to keep an eye out on Senate Bill 298; Part of that proposed legislation deals with a statewide contract on Financial Literacy and Default Management. Ray reported that SCSLC would be bidding toward being awarded that state contract, if the legislation is passed. He explained that debt in SC has increased over 300% over the past 3 years and the colleges are currently receiving the bulk of the blame. There is a debt crisis, and 200% of that increase is students just not paying their loans back, which makes the overall debt percentage higher.

Bridget Blackwell – Conference

Bridget thanked the Conference committee for their hard work, as it paid off with a successful conference. 129 members registered for the conference. The results of the evaluation that was sent out following the conference is included in the attached report. Bridget reported that the overall cost was over \$41,000, but there was a \$5,000 discount. She also reported that 57 rooms were picked up Sunday night and that all bills for the conference have been paid. She also stated that our hotel contact, Nick, left the Sonesta a few weeks post-conference.

JW Kellam – Site Selection

Discussion – Conference Dates and Location for the 2021 Conference: JW reported that the Site Selection committee is working to finalize the dates for the fall 2021 conference and select an adequate location. The possible dates are October 17-20, 2021 or October 24-27, 2021. Among the choices of location is the Embassy Suites Myrtle Beach-Oceanfront Resort at the Kingston Plantation Resort (where the 50th and 51st Conferences were held) and the Bay Watch Resort & Conference Center. Samantha Hicks volunteered to stay at the Bay Watch and see if it would be suitable for SCASFAA; Samantha voiced her concern with the Bay Watch, as they are individually owned condos which could either be really good or really bad. Zach suggested SCASFAA look at returning to the Embassy as the conference center has been significantly upgraded since the last time SCASFAA held a conference there and saw it first hand when presenting at the CACRAO conference; Kelly also confirmed that the upgrades to the conference center improved the location. Both Kelly and Ray stated that, from a sponsorship standpoint, the booth locations at the Embassy increased member visits to the sponsor tables.

After further discussion, Bay Watch is off the table as a potential location. President Howze called for a motion to select the dates of the Fall 2021 Conference, Zach moved to select October 17– 20, 2021 with preference going to the Embassy Suites; the motion carried.

Samantha Hicks – Association Involvement and Leadership Task Force

Discussion – Volunteer Recruitment and LEAD Mentor Program: Samantha reported that the Task Force is seeking to improve the volunteer recruitment process, moving to a model similar to how SASFAA solicits volunteerism. This would include the creation of a volunteer “event” in Wild Apricot and moving away from using the Membership Application/Profile as the volunteering platform, as many members forget to update volunteer choices, etc. The process would begin in March/April annually. It was suggested removing the volunteer choices from the membership application all together and add a blanket statement to encourage members to contact the chair of the Volunteer Committee if after the deadline to submit Volunteer choices via the “event” sign-up. Samantha moved to update the process per the Task Force’s suggestion, and the motion carried.

Samantha also brought forth the recommendation of the Leadership Education & Association Development (LEAD) Program. The idea of the LEAD Program would be to create Vice-Chairs for certain committees and this be the mentorship to prepare members for future roles as committee chairs, etc. Elizabeth expressed her support in this idea, but the concern is that this would limit the incoming President’s power to select Committee Chairs based on whom the previous president selected. The LEAD program would state very clearly that involvement on the Board as a Vice-Chair does not guarantee his/her selection as a Committee Chair the following year. It was stated that the main purpose of the LEAD program will be for stability of the Board and continuity in training of certain positions. Jennifer also agrees this would be a benefit to SCASFAA but expressed her concern about the logistics of extra seats at the table (physical space) and the additional costs of extra Board members. The idea will be to have Vice-Chairs only attend certain board meetings and/or make sure of teleconference, etc. Earl expressed his support of this idea and how it will help eliminate the idea that the Board is cliquish and only pulls from the same group of people, giving many the chance to volunteer and get a feel for how the Board works. After discussion, Samantha moved to create the LEAD Program, as a responsibility of the Volunteer Committee Chair. The Board voted unanimously to create the program.

Discussion – Task Force Recommendation: Samantha reported that she and the Task Force recommend turning the Task Force into the Volunteer Committee (information provided in attached report). Samantha moved to restructure the Task Force as a non-standing Committee and accept the proposed P&P verbiage included in her report; the motion carried.

Nikki Miller – Sponsorship

Nikki announced that there really isn’t any new news concerning Sponsorship. SCASFAA had 17 sponsors for the 2018-19 fiscal year; 2 are Tier One sponsors and 15 are Tier Two. An idea of the committee is to get sponsors involved more throughout the year instead of it being just “you had a table at the conference and then you’re done”. Melanie asked if rates for the 2019-2020 fiscal year have been set; Nikki reported that at this time, that has not yet been discussed. She will get a committee meeting set and will submit a proposal to the Board for an E-Meeting to discuss and vote on the sponsorship rates.

Elizabeth Milam – Long Range Plan

Elizabeth reported that she is pleased with the diversity of the committee members and that the overall membership is well represented on the Committee. The committee reviewed the Long-Range Plan of all nine regional states and SASFAA’s plan. The last Long-Range Plan was heavily focused on Compliance and Accountability. The committee is working toward proposing a plan that moved more into the goals and visions of the Association. A draft of the Long-

Range Plan was provided (attached). Elizabeth asked the Board to review and be prepared to discuss/vote at the Transitional Board meeting. In the meantime, she asks that suggestions/feedback for the committee be sent to her.

New Business

No new business.

Announcements and Closing Remarks

The next board meeting will be the Transitional Board Meeting; however, an E-Meeting will be forthcoming. The Meeting adjourned at 12:46 PM.

Respectfully Submitted,

A handwritten signature in cursive script, appearing to read 'ZChristian', written in black ink.

Zachary R. Christian
2018-19 SCASFAA Secretary



SCASFAA 2018-2019 Board Report

Date	03/11/2019
Committee	Professional Development
Committee Chair	DJ Wetzel

Committee Member	Institution
Brian Fortman	Presbyterian College
Ken Cole	USC - Lancaster
Susan Young	Bob Jones
Melanie Gillespie	Southern Wesleyan
Aimee Gornto	USC Columbia
Jessie Kiser	Clemson
Brandon Endlsey	Presbyterian College
Claudia Whitehead	USC - Columbia
Holly Gilliam	USC - Columbia
Julie Finn	Suntrust

Goals:

- Move forward with podcast
- Host New Aid Officer Workshop
- Plan Leadership Symposium
- Plan Spring webinar with Dave Bartnicki

Accomplishments:

- NAOW was held at Piedmont Technical College in Newberry, on March 4 and 5th. We had 27 total attendees. 12 attendees for the New Aid officer workshop, and 15 attendees for the Intermediate track with was the Professional Judgment NASFAA U credential
 - I would like to recognize Melanie Gillespie for taking the lead in organizing and planning this event, Missy Perry for on-site logistics and hosting, Holly Gilliam for assisting with check-in and on-site logistics, JW Kellam, Elizabeth Milam, Amy Burke, Zachary Christian, Katie Harrison, Melanie Gillespie, and for presenting sessions at the conference!!
 - We can use the NASFAA U – PJ credential through June 30th, 2019, so I will be sending out a survey very soon to gauge SCASFAA membership interest in a one-day workshop at an Upstate and Low County site to host additional credential workshops. I hope we can maximize the cost of this credential, and also provide this additional training opportunity at a reasonable cost for our members. I would target a cost of \$40 for the one-day workshop, with lunch on your own.
- Webinar with Dave Bartnicki is scheduled for March 15th. We currently have 78 registered.
- Leadership Symposium will be held on May 13th at the Piedmont Technical College Newberry Campus. This year's training will be focused on front-line customer service, and John Furnell, Associate Director for the Center for Professional Excellence at Greenville Tech, will host and facilitate our workshop.

Submitted by: DJ Wetzel



SCASFAA 2018-2019 Board Report

Date	March 20, 2019
Committee	By-Laws Committee
Committee Chair	Zachary Christian, SC Tuition Grants Commission

Committee Member	Institution
Thomas Ard	North Greenville University
Adzrian Fields	Clafin University
Aimee Gornto	USC – Columbia
Katie Harrison	SC Tuition Grants Commission
Earl Mayo	SC Tuition Grants Commission
Elizabeth Miller	USC – Columbia
Danielle Rymer	USC – Columbia

Goals:

1. Conduct a complete review of the P&P and make recommendations to the appropriate board member(s)/committee chair(s)
2. Conduct a complete review of the By-Laws and bring forth any suggestions to the Board
3. Ensure the SCASFAA website links to past board minutes correctly
4. Ensure all draft Board Meeting minutes are posted within two weeks of the board meeting/e-meeting
5. Ensure the Association operates in compliance with its approved By-Laws

Accomplishments:

- Currently reviewing the SCASFAA P&P to ensure all areas are up-to-date and identifying areas that might need updating
- Committee is compiling a list of all committee volunteers for the Archives in accordance with the P&P
- Confirmed the links on the website to past board reports are accurate and work properly
- Maintained timely posting of board meeting minutes and Annual Business Meeting Minutes to the SCASFAA Website
- Backed-up all electronic Secretary records to the SCASFAA Google Drive and is continuing to maintain accurate local and cloud back-ups

Discussion Items:

- General 3 – Permanent Address
 - The SC Higher Education Tuition Grants Commission, which serves as the permanent address for SCASFAA, will be moving to a new office location after June 1st. The Address will need to be updated to:

c/o SC Higher Education Tuition Grants Commission
111 Executive Center Dr, Suite 242
Columbia, SC 29210
 - *Proposal:* For the Board to vote to allow the Secretary to update the Permanent Address in the P&P once the Tuition Grants Commission is located at the new address, and to make future updates without needing a board vote
 - *Suggested Verbiage:*
 1. In accordance with Executive Board action on March 29, 2019, the permanent address of the South Carolina Association of Student Financial Aid Administrators shall be the current address of the SC Higher Education Tuition Grants Commission, with authority given to the Secretary to update the below address as needed, until further action is taken by the Executive Board.
 2. The current permanent address is:
c/o SC Higher Education Tuition Grants Commission
115 Atrium Way, Suite 102
Columbia, SC 29223
- 100.2 – Awards and Recognition
 - The current P&P indicates that nominations for the various SCASFAA awards must be submitted annually by January 15 to the president
 - *Proposal:* Remove specific dates and leave open to a time prior to the conference (i.e. 1 month prior to the Annual Business Meeting)
 - *Suggested Verbiage:*
 - *This would be to update the "Nominations may be made in writing by any current member of SCASFAA and must be submitted annually by January 15 to the President of the Association" in 100.2.1.A; 100.2.2.A; 100.2.3.A*

"Nominations may be made in writing by any current member of SCASFAA and must be submitted annually to the President of the Association, no later than 30 days prior to the Annual Business Meeting"

Submitted by:



Zachary R. Christian
2018-19 SCASFAA Secretary



SCASFAA 2018-2019 Board Report

Date	3/29/19
Committee	Budget
Committee Chair	Angela Fowler, Treasurer

Committee Member	Institution
Bridget Blackwell	USC Regional Campuses
Kisha Howze	York Technical College
Melanie Gillespie	Southern Wesleyan University
Earl Mayo	SC Tuition Grants Commission
Elizabeth Milam	Clemson University
Nikki Miller	Coastal Carolina University
Missy Perry	Piedmont Technical College
Justin Pichey	York Technical College
Traci Singleton	The Citadel
Jennifer Williams	Clemson University

Goals:

Establish 2018-2019 SCASFAA Budget
 Reconcile Bank Account Monthly
 Provide Current Budget Report at each Executive Board Meeting

Accomplishments:

November – February bank statements have been reconciled.
 Completed the template for duties to be used with future Treasurers of the Association.

Submitted by:
 Angela Fowler

SCASFAA

BUDGET OVERVIEW: SCASFAA 1819 - FY19 P&L

July 1, 2018 - March 20, 2019

	TOTAL
Income	
003 Contingency/Transfer of Assets	9,375.03
005 Other Income	375.03
007 Charity Income	1,125.00
020 Membership Dues	
020.1 CY Membership	8,662.50
Total 020 Membership Dues	8,662.50
030 Fall Conference	
030.1 CY Conference	21,937.50
Total 030 Fall Conference	21,937.50
050 Professional Development Income	
050.1 New Aid Officers' Workshop	1,800.00
050.7 Other Workshops	749.97
Total 050 Professional Development Income	2,549.97
070 Sponsorships	
070.1 Conference	10,500.03
Total 070 Sponsorships	10,500.03
083 Dividends Earned	1,874.97
085 Capital Gains	1,874.97
Total Income	\$58,275.00
GROSS PROFIT	\$58,275.00
Expenses	
101 President	4,500.00
102 President-Elect	4,500.00
103 Vice-President	74.97
104 Secretary	74.97
105 Treasurer	450.00
106 Member at Large	150.03
107 Treasurer-Elect	74.97
201 Membership Committee	225.00
202 Communications	74.97
203 Program-Fall Conference	30,750.03
205 Nominations & Elections	74.97
206 Legislative Relations	749.97
208 President's Contingency	749.97
209 Miscellaneous	375.03
213 Professional Development	
213.1 New Aid Officers' Workshop	1,500.03
213.7 Other Workshops	1,500.03
Total 213 Professional Development	3,000.06
213.8 Charles Witten Professional Development Fellowship	524.97
215 Counselor Relations	450.00

	TOTAL
218 Global Issues	524.97
221 Long Range Planning	74.97
222 Sponsorship	524.97
224 Site Selection	74.97
225 Special Projects	450.00
226 Executive Board	
226.1 Transitional Board Meeting	2,625.03
226.2 Board Meetings	749.97
Total 226 Executive Board	3,375.00
227 Insurance & Bonding	600.03
228 Electronic Services	1,500.03
229 Scholarship Awards	2,000.00
230 Advisory Committee to CHE	74.97
233 Fees	1,500.03
234 Ad Hoc/Liaisons Expenses	150.03
235 Charity	1,125.00
Total Expenses	\$58,774.88
NET OPERATING INCOME	\$ -499.88
NET INCOME	\$ -499.88

SCASFAA

BUDGET VS. ACTUALS: SCASFAA 1819 - FY19 P&L

July 1, 2018 - March 20, 2019

	TOTAL		
	ACTUAL	BUDGET	% OF BUDGET
Income			
003 Contingency/Transfer of Assets	18,000.00	9,375.03	192.00 %
005 Other Income		375.03	
007 Charity Income	2,053.42	1,125.00	182.53 %
020 Membership Dues			
020.1 CY Membership	10,530.00	8,662.50	121.56 %
Total 020 Membership Dues	10,530.00	8,662.50	121.56 %
030 Fall Conference			
030.1 CY Conference	20,941.75	21,937.50	95.46 %
Total 030 Fall Conference	20,941.75	21,937.50	95.46 %
050 Professional Development Income			
050.1 New Aid Officers' Workshop	1,875.00	1,800.00	104.17 %
050.7 Other Workshops		749.97	
Total 050 Professional Development Income	1,875.00	2,549.97	73.53 %
070 Sponsorships			
070.1 Conference	3,301.00	10,500.03	31.44 %
Total 070 Sponsorships	3,301.00	10,500.03	31.44 %
080 Interest			
080.1 Checking	1.51		
Total 080 Interest	1.51		
083 Dividends Earned		1,874.97	
083.1 Edward Jones-ST 35/65	829.02		
083.2 Edward Jones-LT 50/50	1,057.21		
083.3 Edward Jones-Money Market	-18,000.12		
Total 083 Dividends Earned	-16,113.89	1,874.97	-859.42 %
085 Capital Gains		1,874.97	
085.1 Edward Jones-ST 35/65	872.10		
085.2 Edward Jones-LT 50/50	2,126.09		
Total 085 Capital Gains	2,998.19	1,874.97	159.91 %
Total Income	\$43,586.98	\$58,275.00	74.80 %
GROSS PROFIT	\$43,586.98	\$58,275.00	74.80 %
Expenses			
101 President	1,550.69	4,500.00	34.46 %
101A Travel	311.38		
101D Supplies	25.81		
101F Miscellaneous	431.98		
Total 101 President	2,319.86	4,500.00	51.55 %
102 President-Elect	3,451.38	4,500.00	76.70 %
102A Travel	231.98		
Total 102 President-Elect	3,683.36	4,500.00	81.85 %
103 Vice-President		74.97	

	TOTAL		
	ACTUAL	BUDGET	% OF BUDGET
104 Secretary		74.97	
105 Treasurer		450.00	
105F Miscellaneous	0.00		
Total 105 Treasurer	0.00	450.00	0.00 %
106 Member at Large		150.03	
106D Supplies	97.99		
Total 106 Member at Large	97.99	150.03	65.31 %
107 Treasurer-Elect		74.97	
201 Membership Committee	77.65	225.00	34.51 %
202 Communications		74.97	
203 Program-Fall Conference	36,755.41	30,750.03	119.53 %
203B Printing	207.58		
203D Supplies	230.66		
203F Miscellaneous	101.14		
Total 203 Program-Fall Conference	37,294.79	30,750.03	121.28 %
205 Nominations & Elections		74.97	
206 Legislative Relations		749.97	
208 President's Contingency		749.97	
209 Miscellaneous	145.31	375.03	38.75 %
213 Professional Development			
213.1 New Aid Officers' Workshop	814.08	1,500.03	54.27 %
213.7 Other Workshops		1,500.03	
Total 213 Professional Development	814.08	3,000.06	27.14 %
213.8 Charles Witten Professional Development Fellowship		524.97	
215 Counselor Relations		450.00	
218 Global Issues	150.00	524.97	28.57 %
221 Long Range Planning		74.97	
222 Sponsorship		524.97	
222D Supplies	383.66		
Total 222 Sponsorship	383.66	524.97	73.08 %
224 Site Selection		74.97	
225 Special Projects		450.00	
226 Executive Board			
226.1 Transitional Board Meeting		2,625.03	
226.2 Board Meetings	145.66	749.97	19.42 %
226.2H Meeting	138.37		
Total 226.2 Board Meetings	284.03	749.97	37.87 %
Total 226 Executive Board	284.03	3,375.00	8.42 %
227 Insurance & Bonding	374.00	600.03	62.33 %
228 Electronic Services	996.60	1,500.03	66.44 %
228F Miscellaneous	972.00		
Total 228 Electronic Services	1,968.60	1,500.03	131.24 %
229 Scholarship Awards	2,000.00	2,000.00	100.00 %
230 Advisory Committee to CHE		74.97	
233 Fees		1,500.03	
233.3 ASCAP/BMI	291.00		

	TOTAL		
	ACTUAL	BUDGET	% OF BUDGET
Total 233 Fees	291.00	1,500.03	19.40 %
234 Ad Hoc/Liaisons Expenses		150.03	
235 Charity	2,668.77	1,125.00	237.22 %
Total Expenses	\$52,553.10	\$58,774.88	89.41 %
NET OPERATING INCOME	\$ -8,966.12	\$ -499.88	1,793.65 %
NET INCOME	\$ -8,966.12	\$ -499.88	1,793.65 %

SCASFAA

BALANCE SHEET

As of March 20, 2019

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	
BB&T Checking	15,244.24
Edward Jones-Money Market	0.00
Wells Fargo Checking	0.00
Total Bank Accounts	\$15,244.24
Other Current Assets	
CD-BB&T #1 0.20% 12/1/14	0.00
CD-BB&T #2 0.05% 11/3/13	0.00
CD-First Citizens 0.05% 11/20/13	0.00
Edward Jones-LT 50/50	100,651.82
Edward Jones-ST 35/65	96,717.68
Total Other Current Assets	\$197,369.50
Total Current Assets	\$212,613.74
TOTAL ASSETS	\$212,613.74
LIABILITIES AND EQUITY	
Liabilities	
Total Liabilities	
Equity	
Opening Balance Equity	220,442.14
Retained Earnings	1,167.72
Net Income	-8,996.12
Total Equity	\$212,613.74
TOTAL LIABILITIES AND EQUITY	\$212,613.74



SCASFAA 2018-2019 Board Report

Date	March 14, 2019
Committee	Communications Committee
Committee Chair	Michelle Upchurch

Committee Member	Institution
Melissa Barnette	Furman
Rosalind Elliott	USC
Gena Miles	SCTG
Allison Sullivan	

Goals:

To publish an exciting and interesting Fall, Spring, and Summer newsletter. Each edition will include a note from the president, updates from SCASFAA members (babies, weddings, new hires, etc.), images of SCASFAA at various events (NASFAA, SASFAA, etc.), and sponsor advertisements.

Accomplishments:

The Palmetto Pages Spring 2019 Edition was sent to the membership February 14, 2019.

Submitted by:

Michelle Upchurch

SCASFAA 2018-2019 Board Report

Date	March 29, 2019
Committee	Consumer/Counselor Relations
Committee Chair	Kelly Savoie

Committee Member	Institution
Danielle Rymer	USC Columbia
Amy Jared	Ti-county
Brandon Endsley	Presbyterian
Vicky Allen	USC Upstate – Resigned
Kathy Cribb	Furman University

- Goals:
- 1- Provide assistance, as appropriate, to secondary schools in scheduling, coordinating, and conducting financial aid workshops for parents and students.
 2. Seek input from secondary school counselors and personnel concerning financial aid information and training needs.
 3. Provide financial aid information and training to secondary school counselors and personnel.
 4. Develop and disseminate information concerning financial aid opportunities as well as financial planning to as wide an audience as possible through use of available media.
 5. Coordinate with other Association committees to ensure that all pertinent information, concerning their activities that affect the public, is made available through appropriate media.
 6. Recommend to the President and Executive Board ways in which the Association can better work to meet the needs of secondary counselors in the state and enhancing the availability of financial aid information to consumers
 7. Actively solicit involvement by members of the financial aid community.
 8. Develop specific annual objectives to be undertaken by the committee as appropriate.
 9. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and material to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives.
 10. Complete the duties as assigned in the Long-Range Plan

Accomplishments:

- Conducted Webinar Debt Notification / Letter
- Presented session for Palmetto School Counselor Assoc in January
- Money Smart Week March 30th -April 6th – Federal Reserve will count any events throughout month of April
 - Regions, Founders Federal Credit Union, Suntrust, Sallie Mae, SC Student Loan committed resources, presentations. Federal Reserve of Richmond (who covers South Carolina has committed to participate for next year)
 - Schools That I know have events: USC Lancaster, Trident Technical, Aiken Technical, Clemson Univ, USC Columbia Student Success, Citadel, Tri-County Tech, Converse College, Anderson University and over 60 events planned in South Carolina for Money Smart (that I know of)

Submitted by: Kelly Savoie



SCASFAA 2018-2019 Board Report

Date	March 29, 2019
Committee	Electronic Services
Committee Chair	Justin Pichey

Committee Member	Institution

Goals:

- Maintain and update SCASFAA website
- Post job listings on behalf of SCASFAA institutions
- Assist executive board members with electronic requests/needs
- Continue to improve the functionality of the SCASFAA website

Accomplishments:

All requests, updates, and job listings received to date are completed.

Submitted by:

Justin Pichey
 Chair
 Electronic Services Committee



SCASFAA 2018-2019 ALL IN Board Report

Date	29MAR2019
Committee	Financial Planning
Committee Chair	Earl Mayo

Committee Member	Institution
Melanie Gillepsie	SWU
Nancy Tate	Anderson
Tasha Morgan	SWU
Zach Christian	SCTGC

Goals:

Conduct Financial Review for 2017-2018.

Conduct Quarterly Financial Reviews.

Input monthly investments income into QuickBooks.

Accomplishments:

First and Second Quarter Reviews completed. Third Quarter Review to begin mid-April upon receipt of documents from Treasurer and Treasurer-Elect.

2017-2018 Financial Review completed. Previously submitted to the President and Board as required.

Monthly investments income input to QB is up to date.

\$18,000 cashed out of Investments to sustain 2018-2019 Association expenses.

Submitted by:

Earl Mayo
Chair

SCASFAA QUARTERLY FINANCIAL REVIEW

OCTOBER 1, 2018 – DECEMBER 31, 2018

1. Board Meeting minutes for November 11, 2018, are posted to the web site.
Business Meeting Minutes for November 12 and 14, 2018, are posted to the web site.
2. Beginning check number for Second Quarter is 2763.
3. Sufficient descriptions on QuickBooks entries for expenses.
4. Next available check for Third Quarter is 2782.
5. Bank Account Reconciliations are complete.
6. Funds Amounts on Balance Sheet for December 31, 2018, are correct:
 - a. Checking: \$36,472.82
 - b. Money Market: \$0.00
 - c. LT Investments: \$110,537.70
 - d. ST Investments: \$104,708.01
7. Membership:
 - a. Wild Apricot: 336
 - b. QuickBooks: 336
 - c. Balanced.
8. Event Registration Payments for the Quarter (Annual Conference):
 - a. Wild Apricot: 105
 - b. QuickBooks: 105
 - c. Balanced.
9. Sponsorship Payments for the Quarter:
 - a. Wild Apricot: 4 (1=\$1300; 3=\$667)
 - b. QuickBooks: 4 (1=\$1300; 3, \$667)
 - c. Balanced.
10. 2017 IRS 990-EZ filed on 31OCT18.
11. Starting January 1, anyone with an Aging Receivable more than 90 days old should be contacted and payment requested. After June 1, all remaining outstanding Aging Receivables should be contacted by telephone as soon as possible after June 1 to enable payment receipt by June 30.

There should be no outstanding Aging Receivables in Wild Apricot after June 30.

12. Numerous transactions done in Wild Apricot during the second quarter concerning Association financial transactions, including voiding/deleting invoices from a prior fiscal year (2015-2016) causing numerous accounts in Wild Apricot to show no payments for sponsorship (11) and events (13) and showing the Association owes refund payments to those members totaling \$14,950. These errors will all need to be corrected as soon as possible in the Wild Apricot data base to remove indications that SCASFAA did not receive payments and owes refunds. Corrections should be completed by June 1. The erroneous transactions were done by a Board Member who is not in an authorized Board position to make financial record changes. As a reminder to all Board Members, only the Treasurer or the Treasurer-Elect may make any changes in Wild Apricot for Association financial records including accounts payables or accounts receivables. If an invoice needs to be changed for any reason, that information should be communicated to the Treasurer or the Treasurer-Elect who, with necessary documentation, will make the correct change.
13. Continue to follow or complete all recommendations from the 2017-2018 Financial Review (October 8, 2018).



SCASFAA 2018-2019 Board Report

Date	3/29/2019
Committee	Legislative Relations Committee
Committee Chair	Joey Derrick

Committee Member	Institution
Brandon Lindsey	USC-Columbia
Ken Cole	USC-Lancaster
Ana Montjoy	USC-Salkehatchie
Stephanie McCarter	USC-Columbia
Adam Ghiloni	TriCounty Technical College
Cameron Mott	Coastal Carolina University

Goals:

1. Keep the SCASFAA membership informed of proposed, considered, and passed legislation related to the administration of aid.
2. Formalize SCASFAA responses to legislative issues where appropriate.
3. Delegate responsibilities among committee members.
4. Serve on the SASFAA legislative relations committee, to include visits with U.S. Congressional staff.
5. Assess and monitor results of mid-term elections for possible impact to aid.

Accomplishments:

1. Reviewed current and proposed federal and state legislation for the upcoming legislative and congressional sessions.
2. Assigned legislative monitoring responsibilities to committee members and notified membership of important legislative activity (see attached). Those responsibilities are:
 - Reauthorization of the Higher Education Act – **Joey Derrick**
 - Federal Spending Bills with an Impact to Federal Student Aid – **Brandon Lindsey**

- Federal Legislation Affecting Student Aid, Not Part of Reauthorization of the Higher Education Act – **Cameron Mott**
- Federal Legislation Affecting the Collection of Personally Identifiable Information (PII) and/or Privacy and Data Sharing Restrictions – **Ken Cole**
- SC Legislation Affecting State and Institutional Aid – **Adam Ghiloni**
- SC Legislation Affecting Operations at Public Institutions – **Stephanie McCarter**
- SC Legislation Affecting K-12 That Could Impact Institutions – **Ana Montjoy**
- SC Budget Bill – **Joey Derrick**

3. Participated in SASFAA Legislative Relations Committee work

Submitted by: Joey Derrick

DERRICK, JOEY

From: scasfaa@list.scasfaa.org on behalf of DERRICK, JOEY <JCDERRIC@mailbox.sc.edu>
Sent: Tuesday, February 5, 2019 9:54 AM
To: scasfaa@list.scasfaa.org
Subject: SCASFAA: Senator Lamar Alexander (R-TN) and Reauthorization of the Higher Education Act

Dear SCASFAA,

Yesterday, Senator Lamar Alexander (R-TN) announced a bold and aggressive plan to reauthorize the Higher Education Act by Christmas 2019.

No new legislation was introduced, but he outlined his priorities, which include:

- FAFSA Simplification
- Streamlining Student Loan Repayment
- Creating Accountability for Institutions Based on Loan Repayment Rates

Please see the following article on NASFAA's public-facing site at https://www.nasfaa.org/news-item/17387/Senate_Education_Committee_Chairman_Outlines_Reauthorization_Proposals.

This is still a very long way from becoming reality, but because Senator Alexander plans to retire in 2020 we can expect to see a strong effort to move this through.

Thanks!

Joey

Joey Derrick
SCASFAA Legislative Relations Chair

Joey Derrick
Director
Office of Student Financial Aid and Scholarships
University of South Carolina – Columbia
<http://www.sc.edu/financialaid/>



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The SCASFAA LISTSERV - You must "Reply All" for your response to be sent to the entire LISTSERV.

Please notify Justin Pichey, Electronic Services Chair, at jpichey@yorktech.edu regarding any issues.

To unsubscribe from this list please go to
<http://www.simplelists.com/confirm.php?u=JdqZFTHXjKq06WBVGvpCYKxpipU2pBZ2>

DERRICK, JOEY

From: DERRICK, JOEY
Sent: Wednesday, March 20, 2019 9:18 AM
To: scasfaa@list.scasfaa.org
Subject: Classroom to Careers Act of 2019

Dear SCASFAA,

New legislation has been introduced in the US Senate aimed at the FWS program. Called the "Classrooms to Careers Act of 2019," it would allow FWS for full-time employment as part of a strategy for FWS to be used in co-ops with off-campus employers, including those in the private sector. The bill provides no additional funding for the FWS program.

Additionally, the bill may require **all** FWS positions to meet the requirements of the Workforce Innovation and Opportunity Act. Those are:

- Align with skills needed in state or regional industries
- Prepare the student to be successful in secondary or postsecondary education options
- Include counseling to support the student's career or educational goals
- Include, if appropriate, education offered concurrently and in the same context as the workforce training
- Organize education and training that allows each individual to accelerate their educational and career advancement as allowable
- Enable the student to obtain at least one postsecondary credential
- Help the student advance within a specific occupational area

The bill is very short, leaving much to interpretation. It was my understanding that this bill was initially introduced in order to offer additional options for schools to use FWS rather than restrict usage of it, but the language of the bill is unclear on this. Please see below for more information from NASFAA on this:

<https://www.nasfaa.org/news-item/17774/ Classrooms to Careers Act Proposes Full-Time FWS-Funded Positions New Job Eligibility Requirements>

Thanks!

Joey
SCASFAA Legislative Relations Chair

Joey Derrick
Director
Office of Student Financial Aid and Scholarships

University of South Carolina – Columbia
<http://www.sc.edu/financialaid/>



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DERRICK, JOEY

From: scasfaa@list.scasfaa.org on behalf of DERRICK, JOEY <JCDERRIC@mailbox.sc.edu>
Sent: Thursday, March 14, 2019 8:56 AM
To: scasfaa@list.scasfaa.org
Subject: SCASFAA: House Education and Labor Committee Hearing on College Costs

Dear SCASFAA,

Yesterday, the House Education and Labor Committee held the first of five hearings related to college affordability issues. The hearing was full of testimony that covered many of the issues we discuss as an association. Topics such as student debt (and the sensationalizing of this topic), college accountability, impacts to borrowers who do not graduate, the pros and cons of “free tuition” programs, and loan repayment options are just a few of the items discussed. Testimony from a wide range of experts was heard. Much more was discussed. Please see the following from NASFAA for more information:

[https://www.nasfaa.org/news-item/17737/House Higher Education Act Reauthorization Hearing Covers Range of College Affordability Issues](https://www.nasfaa.org/news-item/17737/House-Higher-Education-Act-Reauthorization-Hearing-Covers-Range-of-College-Affordability-Issues)

These hearings will be an important indicator of the issues to watch during the reauthorization of the HEA.

Thanks!

Joey

Joey Derrick
SCASFAA Legislative Relations Chair

Joey Derrick
Director
Office of Student Financial Aid and Scholarships
University of South Carolina – Columbia
<http://www.sc.edu/financialaid/>



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Please notify Justin Pichey, Electronic Services Chair, at jpichey@yorktech.edu regarding any issues.

To unsubscribe from this list please go to
<http://www.simplelists.com/confirm.php?u=JdqZFTHXjKq06WBVGvpCYKxpipU2pBZ2>

DERRICK, JOEY

From: DERRICK, JOEY
Sent: Tuesday, March 26, 2019 10:41 AM
To: scasfaa@list.scasfaa.org
Subject: SCASFAA Legislative News: AACRAO considering recommendations on Data Protection in regards to both European Union and California laws.

Dear SCASFAA,

Please see below regarding data privacy updates, courtesy of Legislative Relations Committee member Ken Cole.

Thanks!

Joey

Joey Derrick
Director
Office of Student Financial Aid and Scholarships
University of South Carolina – Columbia
<http://www.sc.edu/financialaid/>



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From: COLE, KENNETH <colekt@email.sc.edu>
Sent: Tuesday, March 26, 2019 9:27 AM
Subject: SCASFAA Legislative News: AACRAO considering recommendations on Data Protection in regards to both European Union and California laws.

On Tuesday, April 2nd, at the AACRAO Annual Meeting the “Data Privacy and Protection Task Force” will provide an update on GDPR and Flagging DS Records. GDPR stands for “General Data Protection Regulations” and is the European Union’s (EU) regulation on data protection and privacy for all individuals within the EU and the European Economic Area (EEA). Most importantly for us, though, it also addresses the export of personal data outside the EU and EEA areas. This means it has an impact on international students and U.S. Citizens who live or are coming from abroad and will be applying to college in the U.S. They will also address issues around the California Consumer Privacy Act (CCPA) which gives California consumers unprecedented personal data protections (effective 2020).

While these rules don’t vary significantly from FERPA, the Privacy Act and Federal Regulations on the use of FAFSA data, it is important to understand how each of the acts impacts particular groups of students.

The GDPR sets stricter controls on the use and maintenance of data from international students coming from the EU (and some US Citizens coming from there as well). While many of these students won't be eligible for Federal Aid, their applications for admissions and scholarships are impacted by these rules. Some, though, will be eligible for Federal Student Aid and will file FAFSAs. We need to keep this in mind when processing students who are from or whose FAFSA parents are from the EU or EEA.

The CCPA specifically applies to individuals from California, and as such includes parent data from California. In most cases Federal Laws and regulations will trump these rules, however we are required to use the strictest set of rules when managing data. As such, when a parent or student from California is impacted by a Data Breach or requests access to data or their data is disseminated to a 3rd party for any reason, we must consider these regulations. The most concerning point of the act is that it specifically states that an institution may be held liable for a data breach if they do not find that the institution maintained reasonable security procedures, and yet it doesn't clearly define what is "reasonable".

Here are some primary points from the CCPA that should be considered:

CCPA:

1798.100. Right to Know What Personal Information is Being Collected. 1798.100. (a) A consumer shall have the right to request that a business that collects personal information about the consumer disclose to the consumer the categories of personal information it has collected about that consumer.

1798.101. Right to Know Whether Personal Information is Sold or Disclosed and to Whom.

1798.101. (a) A consumer shall have the right to request that a business that sells the consumer's personal information, or that discloses it for a business purpose, disclose to that consumer: (1) the categories of personal information that the business sold about the consumer and the identity of the third parties to whom such personal information was sold, by category or categories of personal information for each third party to whom such personal information was sold; and (2) the categories of personal information that the business disclosed about the consumer for a business purpose and the identity of the persons to whom such personal information was disclosed for a business purpose, by category or categories of personal information for each person to whom such personal information was disclosed for a business purpose.

1798.103. Right to Equal Service and Price. 1798.103. A business shall be prohibited from discriminating against a consumer because the consumer requested information pursuant to sections 1798.100 or 1798.101, or because the consumer directed the business not to sell the consumer's personal information pursuant to section 1798.102, or because the consumer exercised the consumer's rights to enforce this Act, including but not limited to, by: (a) denying goods or services to the consumer; (b) charging different prices or rates for goods or services, including through the use of discounts or other benefits or imposing penalties; (c) providing a different level or quality of goods or services to the consumer; or (d) suggesting that the consumer will receive a different

price or rate for goods or services, or a different level or quality of goods or services, if the consumer exercises the consumer's rights under this Act.

1798.112. A business that suffers a breach of the security of the system, as defined in subdivision (g) of section 1798.82, involving consumers' personal information, as defined in subdivision (h) of section 1798.82, shall be deemed to have violated this Act and may be held liable for such violation or violations under sections 1798.108, 1798.109, and 1798.111, if the business has failed to implement and maintain reasonable security procedures and practices, appropriate to the nature of the information, to protect the personal information from unauthorized disclosure.

Section 1798.81.5 is existing California code that requires: A business that owns, licenses, or maintains personal information about a California resident shall implement and maintain reasonable security procedures and practices appropriate to the nature of the information, to protect the personal information from unauthorized access, destruction, use, modification, or disclosure.

For more information on the CCPA please see: <https://www.caprivacy.org/>

Here are some important points from the GDPR:

Increased Territorial Scope (extraterritorial applicability)

Arguably the biggest change to the regulatory landscape of data privacy comes with the extended jurisdiction of the GDPR, as it applies to all companies processing the personal data of data subjects residing in the Union, regardless of the company's location

Penalties

Organizations in breach of GDPR can be fined up to 4% of annual global turnover or €20 Million (whichever is greater). It is important to note that these rules apply to both controllers and processors – meaning 'clouds' are not exempt from GDPR enforcement.

Consent

The conditions for consent have been strengthened, and companies are no longer able to use long illegible terms and conditions full of legalese. The request for consent must be given in an intelligible and easily accessible form, with the purpose for data processing attached to that consent. Consent must be clear and distinguishable from other matters and provided in an intelligible and easily accessible form, using clear and plain language. It must be as easy to withdraw consent as it is to give it.

Data Subject Rights

Breach Notification Under the GDPR, breach notifications are now mandatory in all member states where a data breach is likely to "result in a risk for the rights and freedoms of individuals". This must be done within 72 hours of first having become aware of the breach. Data processors are also required to notify their customers, the controllers, "without undue delay" after first becoming aware of a data breach.

Right to Access

Part of the expanded rights of data subjects outlined by the GDPR is the right for data subjects to obtain confirmation from the data controller as to whether or not personal data concerning them is being processed,

where and for what purpose. Further, the controller shall provide a copy of the personal data, free of charge, in an electronic format.

Right to be Forgotten

Also known as Data Erasure, the right to be forgotten entitles the data subject to have the data controller erase his/her personal data, cease further dissemination of the data, and potentially have third parties halt processing of the data. The conditions for erasure, as outlined in article 17, include the data no longer being relevant to original purposes for processing, or a data subject withdrawing consent. It should also be noted that this right requires controllers to compare the subjects' rights to "the public interest in the availability of the data" when considering such requests.

Data Portability

GDPR introduces data portability – the right for a data subject to receive the personal data concerning them – which they have previously provided in a 'commonly use and machine readable format' and have the right to transmit that data to another controller.

Privacy by Design

At its core, privacy by design calls for the inclusion of data protection from the onset of the designing of systems, rather than an addition. More specifically, 'The controller shall... implement appropriate technical and organisational measures... in an effective way... in order to meet the requirements of this Regulation and protect the rights of data subjects'. Article 23 calls for controllers to hold and process only the data absolutely necessary for the completion of its duties (data minimisation), as well as limiting the access to personal data to those needing to act out the processing.

For more information on the GDPR please see: <https://eugdpr.org/>

Thank you,
Ken Cole

Kenneth T. Cole
Director of Financial Aid and Veteran Affairs
University of South Carolina Lancaster, A Palmetto College Campus
476 Hubbard Drive, Starr Hall 127
PO Box 889; Lancaster, SC 29721-0889
Office #: 803-313-7069; E-mail: colekt@email.sc.edu
<https://sc.edu/lancaster/finaid>

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DERRICK, JOEY

From: DERRICK, JOEY
Sent: Thursday, February 7, 2019 12:21 PM
To: scasfaa@list.scasfaa.org
Subject: Data Sharing Clarification

Dear SCASFAA,

As many of you know, data sharing has become a very slippery, and often confusing, slope. Additional legislation was included in the FY19 spending bill to allow for additional situations in which data sharing is allowed. NASFAA has further clarified these issues this week.

Please see below for more information, courtesy of Legislative Relations Committee member Ken Cole:

In January the FY 2019 Spending Bill expanded the list of 3rd party organizations that a student may share their FAFSA Data with. A student may now give written consent to any organization who will assist the applicant in applying for and receiving Federal, State, Local or tribal assistance to cover any component of the applicant's cost of attendance. NASFAA has now updated their Data_Decision_Tree (found here: https://www.nasfaa.org/uploads/documents/Data_Sharing_Decision_Tree_2019.pdf). What more, they have release some Case Studies to help us evaluate specific situations (found here: https://www.nasfaa.org/uploads/documents/FAFSA_Data_Sharing_Case_Studies.pdf).

Please refer to the scenarios in detail, but here is a quick summary:

Scenario #1: Sharing student data to proactively identify eligibility for public benefits

This would be for benefits like subsidized health care, subsidized housing, nutrition benefits (SNAP, WIC, etc...), and other such benefits. Be sure to consider your Cost of Attendance Components and remember that those components represent ONLY the student's expenses. So, benefits that would in no way assist the student may not be considered. Written consent is required, either on the form provided by the agency or on a form you created in office

Scenario #2: Data-Sharing for emergency aid programs administered by the school's foundation

This would be for emergency grants, or special scholarships that are awarded when a student is in need. They count as Estimated Financial Aid, so this would be permissible. You must, though, still have the student's written consent. I suggest adding this to your Scholarship Applications, if need is a component.

Scenario #3: Sharing student data to prioritize applications or determine eligibility for on-campus child care

Sharing FAFSA Data for awarding of a grant or subsidy to reduce child care expenses would be permissible, with written consent from the student, so long as Child Care Expenses were part of the Cost of Attendance you were considering. In other words, if the Dependent Student's parents are seeking this benefit it would not; but if it were an Independent student who you have a Child Care Component in COA, then you could. Again, with written consent.

Scenario #4: Sharing student data with the institutional housing office to identify students who might qualify to live on campus during breaks

If your housing office is ONLY notifying the student of available housing during breaks, but still charging regular rates, then giving them a list of students who indicated they are homeless would NOT be allowed.

However, what this scenario does not mention is that IF your housing office is seeking to grant a reduction in cost or even free housing during those breaks, and those breaks are calculated into your Room portion of your COA Budget, then you could provide information on indicators from the FAFSA with the written consent of the student.

For example, if the Dorms are normally closed during Spring break, and therefore all students are not being charged for Spring Break as part of their housing, then it is likely that your budget considers that 1 week of "Room and Board" of your 9 month academic year to be the expense of living at home (IE Maybe you have an increased travel component for students returning home during Spring Break). If a dorm is going to be made available at no extra cost to students during that 1 week who demonstrated need on the FAFSA or indicated homelessness, then this student's COA Room component will be impacted. As such, you could release that information with written student consent.

The take away from all of this is that, unless it is specifically for the awarding of State and Federal Student Financial Aid, written consent is required to release data and even then, that data must only be released for the purposes of applying for or awarding aid that offsets the Cost of Attendance.

Thanks,
Ken

Kenneth T. Cole
Director of Financial Aid and Veteran Affairs
University of South Carolina Lancaster, A Palmetto College Campus
476 Hubbard Drive, Starr Hall 127
PO Box 889; Lancaster, SC 29721-0889
Office #: 803-313-7069; E-mail: colekt@email.sc.edu
<https://sc.edu/lancaster/finaid>

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Joey Derrick
Director
Office of Student Financial Aid and Scholarships
University of South Carolina – Columbia
<http://www.sc.edu/financialaid/>



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DERRICK, JOEY

From: DERRICK, JOEY
Sent: Friday, February 8, 2019 1:43 PM
To: scasfaa@list.scasfaa.org
Subject: FAFSA Fairness Act of 2019

Dear SCASFAA,

On Thursday, a bill was introduced in the US Senate and House of Representatives seeking to allow students who cannot obtain parental information to notate this via a new provisional question on the FAFSA. Such a student would be considered “provisionally independent,” with an EFC and estimated Pell Grant award, rather than the FAFSA being rejected for missing parental information. Schools would be required to reach out to these students in order to determine whether a dependency override is warranted.

More about this bill can be found on NASFAA’s public-facing site at <https://www.nasfaa.org/news-item/17419/Democratic-Lawmakers-Aim-to-Help-Students-Without-Access-to-Parental-Information-to-Complete-the-FAFSA>. Thanks!

Joey Derrick
SCASFAA Legislative Relations Chair

Joey Derrick
Director
Office of Student Financial Aid and Scholarships
University of South Carolina – Columbia
<http://www.sc.edu/financialaid/>



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DERRICK, JOEY

From: DERRICK, JOEY
Sent: Thursday, December 20, 2018 9:14 AM
To: scasfaa@list.scasfaa.org
Subject: RE: Faster Access to Federal Student Aid (FAFSA) Act of 2018

Dear SCASFAA,

This bill has passed the US Senate unanimously and now moves to the US House of Representatives for consideration.

Thanks!

Joey

Joey Derrick
SCASFAA Legislative Relations Chair

Joey Derrick
Director
Office of Student Financial Aid and Scholarships
University of South Carolina – Columbia
<http://www.sc.edu/financialaid/>



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From: DERRICK, JOEY
Sent: Wednesday, November 14, 2018 8:35 AM
To: 'scasfaa@list.scasfaa.org' <scasfaa@list.scasfaa.org>
Subject: Faster Access to Federal Student Aid (FAFSA) Act of 2018

Dear SCASFAA,

Yesterday, the Faster Access to Federal Student Aid (FAFSA) Act of 2018 was introduced in the US Senate. The bill is designed to streamline the federal student aid application process by amending both the HEA and Internal Revenue Code to improve data-sharing. More information about this bill is available on NASFAA's public-facing site at <https://www.nasfaa.org/news->

[item/16761/Senators Introduce Bipartisan Bill to Simplify FAFSA and Reduce Verification through ED-IRS Data Sharing.](#)

Thanks!

Joey

Joey Derrick
SCASFAA Legislative Relations Chair

Joey Derrick
Director
Office of Student Financial Aid and Scholarships
University of South Carolina – Columbia
<http://www.sc.edu/financialaid/>



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DERRICK, JOEY

From: DERRICK, JOEY
Sent: Tuesday, January 22, 2019 10:33 AM
To: scasfaa@list.scasfaa.org
Subject: South Carolina WINS Scholarship

Dear SCASFAA,

A bill to create the South Carolina Workforce Industry Needs Scholarship (SCWINS) was introduced in the SC House of Representatives on 1/15/19 and referred to the House Ways and Means Committee. This may be of particular interest to those of you presenting to the House Ways and Means Committee over the next several weeks. Please see below for more details, courtesy of Legislative Relations Committee member Adam Ghiloni.

Joey Derrick
SCASFAA Legislative Relations Committee Chair

Joey Derrick
Director
Office of Student Financial Aid and Scholarships
University of South Carolina – Columbia
<http://www.sc.edu/financialaid/>



When submitting documents to our office, any Personally Identifiable Information (PII) must first be redacted prior to submission. View our [Form and Document Submission Guidelines](#) for more information.

From: Ghiloni, Adam A. <aghiloni@tctc.edu>
Sent: Tuesday, January 22, 2019 10:22 AM
To: DERRICK, JOEY <JCDERRIC@mailbox.sc.edu>
Subject: South Carolina WINS Scholarship

https://www.scstatehouse.gov/sess123_2019-2020/bills/3576.htm

A BILL

TO AMEND THE CODE OF LAWS OF SOUTH CAROLINA, 1976, BY ADDING SECTION [59-150-365](#) SO AS TO ESTABLISH THE SOUTH CAROLINA WORKFORCE INDUSTRY NEEDS SCHOLARSHIP (SC WINS), TO PROVIDE THAT CERTAIN STUDENTS ATTENDING A TWO-YEAR TECHNICAL

COLLEGE ARE ELIGIBLE FOR THE SCHOLARSHIP, AND TO PROVIDE ELIGIBILITY REQUIREMENTS.

Be it enacted by the General Assembly of the State of South Carolina:

SECTION 1. Chapter 150, Title 59 of the 1976 Code is amended by adding:

"Section [59-150-365](#). (A)(1) A student who is attending a two-year public technical college, who is majoring in a critical workforce area program, as defined and recommended by the State Board for Technical and Comprehensive Education (SBTCE) and ratified by the South Carolina Coordinating Council for Workforce Development, and who is receiving a Lottery Tuition Assistance Program Scholarship (LTAP) for the current school year, shall receive an additional South Carolina Workforce Industry Needs Scholarship (SC WINS). The SC WINS scholarship is equal to the cost of attendance after applying all other scholarships or grants, not to exceed two thousand five hundred dollars each school year for no more than three school years of instruction, including the student's freshman year. If the student is enrolled in an associate degree program, the stipend is allowed for no more than two school years of instruction, including the student's freshman year if enrolled in a diploma or certificate program.

(2) During the student's freshman year, the student must be enrolled in at least six credit hours of instruction each semester, including at least three credit hours of instruction in one of the critical workforce areas defined by the SBTCE. To receive the additional SC WINS scholarship each school year, the student must receive the underlying LTAP scholarship for that school year and must be making acceptable progress each school year towards receiving a degree in one of the majors pursuant to this section. For purposes of meeting this required minimum level of instruction in the student's major courses during a student's freshman year, dual enrollment courses taken in high school in these critical workforce area programs count toward the fulfillment of the minimum requirement.

(B) The SBTCE shall promulgate regulations to define what constitutes a critical workforce program area. Nothing herein prevents a student from changing majors within the acceptable disciplines. Additionally, the SBTCE annually shall communicate with high school guidance counselors regarding the list of qualifying majors. The critical workforce program list must be reviewed at least every five years and adjusted based on workforce trends and industry needs. Critical workforce program additions or deletions must be ratified by the South Carolina Coordinating Council for Workforce Development.

(C) If the additional SC WINS scholarship is lost, it may be regained in the same manner the underlying LTAP scholarship is regained.

(D) In order for a student to be eligible after attempting twenty-four academic credit hours, the student must have earned a grade point average of 2.0 or better on a 4.0 grading scale.

(E) A student may not be eligible to receive the SC WINS scholarship for more than one certificate, diploma, or degree within any five-year period unless the additional certificate, diploma, or degree constitutes progress in the same field of study.

(F) A dual-enrollment student who is in his junior or senior year of high school, who is majoring in one of the critical workforce areas at a technical college qualifies for the SC WINS scholarship.

(G) Additionally, a three-hundred-dollar book allowance each school year is applied to a SC WINS recipient's account for expenses towards the cost of attendance including the cost of textbooks.

(H) If a critical workforce area program is placed on suspension during the SBTCE's annual program evaluation process, that program no longer qualifies for SC WINS funds at that specific college. Students must be advised on how to complete their program by transferring to another technical college or serving as a transient student at another technical college to complete specified courses."

SECTION 2. This act takes effect on July 1, 2019 and applies to the 2019-2020 school year.

Adam A. Ghiloni

Director of Financial Aid and Money Management Center
Certified Personal Financial Manager



"Passionate people transforming lives and building strong communities one student at a time"

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SCASFAA 2018-2019 Board Report

Date	March 29, 2019
Committee	Conference (Program)
Committee Chair	Bridget Blackwell- University of South Carolina Palmetto College

Committee Member	Institution
Melissa Barnette	Furman University
Jan Belton	Edward Via College of Osteopathic Medicine - Carolinas Campus
Zachary Christian	SC Tuition Grants Commission
Shannon Cross	Inceptia
Nikisha Dawkins	York Technical College
Angela Fowler	Anderson University
Holly Gilliam	University of South Carolina-Columbia
Gerrick Hampton	SC Commission on Higher Education
Katie Harrison	SC Tuition Grants Commission
Samantha Hicks	Coastal Carolina University
James Kellam	Converse College
Michelle Lodato	Lander University
Stephanie McCarter	University of South Carolina-Columbia
Elizabeth Milam	Clemson University
Gena Miles	SC Tuition Grants Commission
Nikki Miller	Coastal Carolina University
Tammie Minter	University of South Carolina Aiken
Miracle Mosely	Winthrop University
Diana O'Bryan	Bob Jones University
Mindy Pavidonis	Pittsburgh Institute of Aeronautics
Missy Perry	Piedmont Technical College
Justin Pichey	York Technical College
Danielle Rymer	University of South Carolina-Columbia
Lilian Sims	University of South Carolina-Palmetto College
Traci Singleton	The Citadel
Ashleigh Speaks	University of South Carolina-Columbia
Wanda Vereen	Horry Georgetown Technical College
Ashley Stuckey	Trident Technical College
Jennifer Williams	Clemson University
Jamie Wilson	Lander University
Tangar Young	South Carolina State University

Goals:

- Plan an annual conference that will be beneficial to the membership by providing valuable training, to include sessions on current regulations and what to expect soon and how legislative actions could impact your office and/or students. Also, to include networking that would enable communication with and learn from other financial aid administrators across the state.

Accomplishments:

- Overall it was a great conference and we had 129 persons registered for the conference.
- Conference Budget
 - Resort Total \$35,976.24
 - Comedian \$250.00
 - T-shirts \$652.27
 - Attendees Gift \$298.75
 - Presenter’s Gift \$260.00
 - Decorations \$123.91
 - Nametags/Ribbons \$106.75
 - Pocket Guide Agenda \$207.58
 - Signage \$3.70
 - Involvement Table \$101.14
 - Candy for prizes \$35.42
 - **CONFERENCE TOTAL \$38,015.76**

	Extremely Satisfied	Somewhat Satisfied	Neither	Somewhat dissatisfied	N/A
Please indicate your overall satisfaction with the 2018-2019 Annual SCASFAA Conference held at the Sonesta Resort Hilton Head Island	24	6	1		
Overall, how satisfied were you with the general session topics and content?	23	8			
Overall, how satisfied were you with the concurrent session topics and content?	20	8	3		
Please rate your overall experience with the online conference registration process	26	5			
How would you rate the venue space?	31				
How helpful/friendly were the hotel staff?	21	7	2		
Overall, how would you rate the conference meals?	24	5	1	1	
How would you rate your overall satisfaction of the event?	22	4	1	2	2
	Yes	NO	N/A		
Did you participate in the "Fun & Networking Night" (Wuzzles and Comedian) activity Tuesday night?	29	2			
Do you have any other feedback you wish to provide?	1	28	2		
Please select the response the most closely expresses your feelings:	19 enjoy a full day of scheduled activities and having meals included with the conference	12 want free time to enjoy the location and would like some meals on my own.			

Please explain what would have made your experience better:

- Nothing
- The questions for the game were lame. The comedian was funny, but the seating should have been more mixed to allow for networking & socializing.

Is there anything else you'd like to share about the venue?

- I think the venue and food was perfect!
- Really enjoyed the hotel - very nice!
- My room was not thoroughly cleaned. My room was at the far end of the floor. I did not feel safe. The hotel staff was talking very loud outside of my room.
- Better planning to have the conference end before checkout. Some people were scrambling to have check out extended since the conference ended 15 minutes after checkout.
- The hotel space was perfect. The service was perfect. The food was delicious!

Please provide your additional feedback:

- I really enjoyed the conference and hope that all future conferences will be as such

What topics or themes would you like to see addressed at the 2019-2020 Annual SCASF AA conference to be held next fall?

- Best Practices on Verification using Tax Returns (if that guidance does not change between now and then); Handling difficult situations while counseling students; Best Practices for daily student aid processing
- SULA/PJ
- Dependency Overrides
- Relaxation techniques-massage opportunities
- Reconciliation tips-group by software users
- Professional judgement open discussion
- Verification
- SAVE
- Work Study
- NCAA rules, customer service (particularly communicating electronically with students and their families), the future of financial aid, and aid for health professional students (nursing, public health, pharmacy, etc).
- Some sessions should be offered several times.
- Subsidized loan limits (150%) and how to calculate the max amount
- Packaging Institutional Aid
- Consumer Information
- I felt like the offerings were for higher level FAAs (directors, assistant directors - FISAP, regulations) or beginning FAAs (less than 2 years' experience - basic processing & counseling). I've been in the financial aid field for 4+ years and have 10+ years' experience, and I felt there weren't sessions suited to non-management, intermediate FAAs. (If there were, it wasn't explained well in the course description).
- Leadership skills, How to Do A Verification, Diversity & Inclusion in Financial Aid, NCAA regulations,
- Moving towards Enrollment Management, How to Create Financial Aid presentations, Using Students in Financial Aid Counseling,

Submitted by:

Bridget D. Blackwell



SCASFAA 2018-2019 Board Report

Date	March 11, 2019
Committee	Site Selection
Committee Chair	J.W. Kellam

Committee Member	Institution
Kathy Cribb	Furman
Biz Daniel	Great Lake
Hank Fuller	Citadel
Gerrick Hampton	CHE
Janee Knippenberg	PNC
Gena Miles	SCTG
Cameron Mott	Coastal Carolina
Leigh Lanford	Converse

Goals: To develop a long-range plan with potential sites throughout the state.

Accomplishments: Rather than have committee members attempt to get bids on their own for their assigned geographical area, we utilized the services of HelmsBriscoe (Melissa Pitzely) at the recommendation of Earl Mayo. This left little work for the committee members.

Mitzy contacted various hotels in requested locations and submitted the attached spreadsheet for the Board's review.

Submitted by: J.W. Kellam, Chair



SCASFAA 2018-2019 Board Report

Date	March 20, 2019
Committee	Involvement & Leadership Task Force
Committee Chair	Samantha Hicks

Committee Member	Institution
Melissa Barnette	Furman
Bridget Blackwell	USC Palmetto College
Zachary Christian	SC Tuition & Grants
Melanie Gillespie	South Wesleyan University
Katie Harrison	SC Tuition Grants
Nikisha Howze	York Tech
JW Kellam	Converse
Earl Mayo	SC Tuition & Grants
Elizabeth Milam	Clemson
Kevin Perry	Coastal Carolina University
Carolyn Sparks	Wofford

Goals:

- I. Create a Task Force comprised of SCASFAA members from various involvement levels, institution types, years of experience, etc.
- II. Ensure all current board members are aware of member volunteer preferences & encourage association leadership to reach out to all potential volunteers.
- III. Work to promote and recognize association involvement with SCASFAA communication methods (website, social media, podcasts, etc.) and activities at the annual conference.
- IV. Analyze the results of the 2017-2018 SCASFAA Survey and the SASFAA Presidents survey concerning involvement/lack of involvement, recruiting success, & challenges.
- V. Present a report to the Executive Board with recommendations based on trends and/or areas of concern evident from the surveys.
- VI. Develop a SCASFAA Leadership Pipeline/Training Program.

Accomplishments:

- Held Online Email Discussion (11/15/18-1/31/19) regarding Task Force goals, & ideas for the implementation of 2018-2019 goals.
- Contacted various members and officers in SASFAA to discuss mentorship program. One concern for SCASFAA board with doing volunteering earlier was the number of volunteers that signed up but did not continue membership. Other SASFAA leaders did not see that as much of an issue. Bryan stated that out of the 84 volunteers that signed up, 7 lapsed & 1 contacted that they changed jobs & could not volunteer. That leaves 76 people who signed up & volunteered (90% rate).
- Discussed goals with President-Elect in order to align mentorship program for 2019-2020.
- Task Force created several recommendations in the following areas (See attached Recommendations).
- Planning has begun on volunteer form (April) & Interviews to Promote Volunteerism leading up to form deadline (interviews waiting until after the election).
 - Are Facebook Live videos appropriate for these interviews?

Submitted by:
Samantha Hicks

Decision 1: Association Involvement & Leadership Committee

Involvement & Committee Task Force Recommendation:

Ensure sustainability of involvement efforts of the association by creating non-standing involvement committee to replace Task Force. (See attached Policies & Procedures Recommendation).

- YES
- NO

Comments/Concerns:

Decision 2: Change Volunteer Recruitment Process

Involvement & Committee Task Force Recommendation:

Begin volunteer recruitment in March/April for next academic year to better facilitate executive board and committee chairs (See attached Information on Volunteer Recruitment).

- YES
- NO

Comments/Concerns:

Decision 3: Creating SCASFAA LEAD (Leadership Education & Association Development) Program

Involvement & Committee Task Force Recommendation:

Formalize mentoring process within leadership pipeline by creating LEAD program (See attached Information on LEAD) and Vice Chair positions on committees. This will help develop potential leaders for the sustainability of the association and promote involvement for association membership.

- YES
- NO

Comments/Concerns:

Decision 1: Association & Involvement Committee
Proposed Policies & Procedures Addendum

CODE NUMBER: 114.2-V

AREA: COMMITTEES

DATE APPROVED:

SUBJECT: Volunteer Committee

The Volunteer Committee is a Non-Standing Committee.

1. Coordinate the process for highlighting and promoting association volunteerism.
2. Review and evaluate the association's involvement procedures and opportunities.
3. Facilitate annual volunteer recruitment for association committees in conjunction with Executive Board.
4. Coordinate volunteer recognition events and/or opportunities.
5. Assist with SCASFAA's LEAD (Leadership Education & Association Development) Program in conjunction with President Elect & Member-at-Large.
6. Complete duties as assigned in the Long-Range Plan.

** Only budgetary concern is travel for Committee Chair (already being done with current task force chair) & volunteer recognition event at Conference (can come out of Program budget similar to 18/19 academic year)**

Decision 2: Volunteer Recruitment

Change Involvement Recruitment Process (VOLUNTEER CHAIR WILL MANAGE).

1. Proposed Timeline Adjustment
 - a. March – Communicate Change in Volunteer Process/Announce Volunteer Information
 - b. April – Recruit Volunteers for 2019/2020 through Wild Apricot Registration Event; Ask for Interest in LEAD Program?
 - c. May/June – President-Elect select LEAD participants (10 VC’s) from Volunteer Form & Chair Suggestions. Can finalize any unfilled Chair Positions. Send out invitations for confirmations & supervisor approvals. Send invitations to Transitional Meeting.
 - d. Transition – Board is given volunteer choices, creates committees, & Chair/VC document volunteer contact (Google Sheet on OneDrive to document contact/responses).
2. Document Contact Efforts
 - a. Volunteer Chair will Put Volunteer Choices in Spreadsheet on Google Drive by Transition.
 - b. Committee Chairs & Vice Chairs will work to contact those interested, documenting contacts & responses.
3. Clear Communication
 - a. Including estimate of time requirement & expected projects in emails. (CHANGES ARE OK!)

Documented Contact Sample

Name	Email Confirmation	Response	Comments
Hicks, Samantha	02/02/2019	NO	Never Responded to My Email
Doe, John	02/02/2019	YES	

Sample Contact Emails to Be Placed on Google Drive:

Hello! Our records indicate that you expressed interest in volunteering for SCASFAA on the _____ committee. We are in the process of finalizing our committees. Please reply to this email confirming whether you are still interested in serving as a volunteer for the 2019-2020 academic year. You must renew your membership in July, be an active, paid member for the 2019-2020 academic year, and have supervisor support to be a committee member. Some of the things this committee will be working on this year are: _____. Committee members can usually expect to spend _____ hours per week on this committee (including any information about other involvement requirements – conference, etc.). We look forward to hearing from you!

Chair & Vice Chair

No Budgetary Impact

Decision 3: Mentoring Program
 SCASFAA LEAD (Leadership Education & Association Development) Program

The goal of this mentoring program is to build a deeper, stronger, more diverse leadership pipeline to support association sustainability by equipping SCASFAA members through leadership exposure, mentoring, networking, and support.

The participants of this program will serve as Vice Chairs for the following committees:

Advisory to CHE
Association Involvement and Leadership
Communications
Counselor & Consumer Relations
Electronic Services

Global Issues
Legislative Relations
Program
Site Selection
Sponsorship

1. Each committee chair can submit 1-2 names of potential VCs to President-Elect each year. The President-Elect could potentially use these as Chairs during his/her presidential term.
2. The committee chairs & Association Involvement Chair will serve as a mentor to the selected vice chairs.
3. The participants will be exposed to board meetings.
 - a. The VCs will be invited to join board meetings by conference call, including day 2 of transition.
 - i. Variation 1: Invite All for 2nd Day of Transition (SCASFAA covers up to maximum for mileage/hotel stay if transition on to board (ex. SCASFAA will cover half)).
 - ii. Variation 2: Allow Only Certain VCs to Attend Transition (Program Committee, etc.) at SCASFAA cost.
 - b. The VCs (if present at cost of institution) are invited to physically attend conference board meeting, pre-conference networking event, hospitality suite, etc.
4. The participants will receive leadership development throughout the year on top of working with committee chairs to achieve committee goals.
 - a. Quarterly opportunities for trainings (can be webinars, ted talk discussions over the phone, podcasts, etc.)
 - i. July/August/September– Welcome to SCASFAA/Robert’s Rules/Goal Setting
 - ii. October/November/December – Leading Others -Multigenerational Leadership, Diversity & Inclusion, Networking, Team Building, Conference
 - iii. Jan/Feb/March – Communication & Advocacy (SASFAA & NASFAA tie-ins)
5. April/May/June – Year in Review/Assessments/Transitioning for Change
6. Future ideas – asking VCs to moderate, special pre-conference activity for VCs, VC pre-posttest assessments, check ins, etc.



SCASFAA 2018-2019 Board Report

Date	March 10 th 2019
Committee	Sponsorship
Committee Chair	Nikki Miller

Committee Member	Institution
Shannon Cross	Inceptia
Melissa Barnette	Furman
Traci Singleton	Citadel

Goals:

- i. Reflect on past fall conference 2018
- ii. How to finish the year out strong with sponsors in mind

Accomplishments:

- ✓ Conference was successful, no negative feedback; 17 vendors, 2 Tier I & 15 Tier II
- ✓ Ideas for future conferences
 - Sponsorship chair should meet with hotel management to confirm logistics of vending area and vending shipments
 - Vendors table set up first-come, first-serve based on sponsorship tiers
 - Sponsor chair should be in the vendors set-up area to meet and greet sponsors when they arrive and assure they are at the correct table
 - Sponsors 8-second elevator pitch during the luncheon was effective (if this will be a continual component sponsorship chair will need to organize line-up and pitch area (podium or floor)
 - Sponsorship reception has opportunity for improvement, such as day of event change and/or entertainment (karaoke/DJ) during the reception
 - Sponsor logos will be requested at the time of application submission due to time constraints of logo board organization

Submitted by:

Nikki Miller



SCASFAA 2018-2019 Board Report

Date	March 29, 2019
Committee	Long Range Plan
Committee Chair	Elizabeth Milam

Committee Member	Institution
Zachary Christian	SCTGC
Hank Fuller	The Citadel
Adam Ghiloni	Tri-County Technical College
Melanie Gillespie	Southern Wesleyan University
Elizabeth Milam	Clemson University
Traci Singleton	The Citadel

Goals:

Research, write, and obtain Board approval for a new five-year Long Range Plan, keeping the following goals in mind:

- Identify strengths of the Association and recommend actions or directions to the Executive Board that will enhance these strengths.
- Identify any weaknesses in the Association and recommend actions for improvement.
- Develop objectives for presentation to the Executive Board as may be appropriate for the enhancement of the Association in its efforts to promote professional development of its membership and support the existence of viable financial aid programs for education.

Accomplishments:

- Reviewed LRPs from SASFAA, Alabama, North Carolina, Kentucky, Georgia, Florida, Mississippi, Tennessee, and Virginia.
- Reviewed SCASFAA's mission statement and 2014-2019 LRP.
- Solicited suggestions and visions to enhance SCASFAA's mission.
- Drafted the 2019-2024 Long Range Plan for Board consideration (attached).

Submitted by:

Elizabeth Milam

South Carolina Association of Student Financial Aid Administrators

Long-Range Plan 2019-2024

Mission Statement

SCASFAA is a community of professionals promoting the advancement of financial assistance programs as an essential part of student access to post-secondary education. In a collaborative effort, SCASFAA provides personal and professional development opportunities that embrace sound principles, practices, and ethics of aid administration. SCASFAA develops future leaders by actively involving all members in an environment of mutual respect, cooperation, and support.

The Long-Range Plan seeks to ensure that the practices of SCASFAA effectively meet the mission of the Association. Values and goals are established based on the mission statement regarding the advancement of financial aid programs and ethical standards; the training, collaboration and leadership development of members; as well as sound organizational and financial practices to maintain the viability, honesty, and integrity of the Association.

The Long-Range Plan is inspired by four values:

1. Adherence to sound, ethical principles and practices
2. Advancement of financial aid programs and access to higher education
3. Sustainment of a collaborative community demonstrating respect, cooperation, support, and engagement
4. Enhancement of professional, personal, and leadership development

1. Adherence to sound, ethical principles and practices

- A. GOAL:** Ensure the By-Laws and Policies & Procedures, reflecting the mission and supporting the viability of SCASFAA, provide consistent direction to efficiently accomplish the current business of the Association.

OBJECTIVE: The Secretary and President-Elect will annually review the governing documents. The Secretary will conduct a review of the previous year's minutes to ensure all approved policy changes have been incorporated.

- B. GOAL:** Ensure that the Association maintains fiscal integrity in its operations.

OBJECTIVE: The Budget Committee and the Financial Planning Committee will annually review the *Guide to Financial Management and Office of Treasurer* and evaluate the Association's adherence to its policies, including money management, budget preparation, and financial reviews.

- C. GOAL:** Ensure that the Association promotes ethical standards and best practices.

OBJECTIVE: The Communications Chair will annually publicize the Code of Practices and the Statement of Ethical Behavior.

2. Advancement of financial aid programs and access to higher education

A. GOAL: Ensure that the Association advocates positions that benefit the advancement of student financial aid, aspiring to a state in which all qualified students, regardless of financial resources, will have access to quality higher education.

OBJECTIVE: Advocate positions that advance student financial aid, when a reasonable consensus exists, and encourage responsible and appropriate involvement by the membership. Annually identify contacts in government, organizations and agencies related to higher education; apprise them of the Association's mission; and offer to provide guidance on student financial aid issues. Explore or expand activities that shape legislation, impact public support, and hone advocacy skills, such as organizing statehouse visits, writing editorial opinions, and conducting email campaigns.

B. GOAL: Ensure that the Association promotes early awareness of and planning for higher education.

OBJECTIVE: Annually conduct outreach activities in schools and the community; enhance and supplement efforts by members and institutions; and actively cultivate a service-oriented culture promoting access to higher education.

C. GOAL: Ensure that the Association recognizes and enhances the role of financial aid administrators as student advocates, counseling professionals, and content experts.

OBJECTIVE: Broaden members' understanding and knowledge of student development theory, intentional advising principles, and financial literacy concepts through professional development and the sharing of resources.

3. Sustainment of a collaborative community demonstrating respect, cooperation, support, and engagement

A. GOAL: Ensure that the Association's membership, committees, and Board are inclusive and value different perspectives.

OBJECTIVE: Aggressively recruit members, select appointees, and seek nominees who reflect the diversity of the financial aid administrators in the state, including gender, ethnicity, geography, sectors, level of experience, and other characteristics that shape our viewpoints.

B. GOAL: Ensure that the Association engages all institutions in the training and networking we offer in support of the compliant and efficient administration of student financial aid.

OBJECTIVE: Increase membership and extend participation to all Title IV-eligible schools in the state. Explore or expand initiatives such as campus visits, trial memberships, conference scholarships, and letters to the upper administration of schools and the technical college system.

- C. GOAL:** Ensure that the Association encourages collaboration between members, institutions, and agencies for the advancement of student financial aid and the benefit of aid administrators.

OBJECTIVE: Provide engagement opportunities for all levels of experience and resources. Avoid entrenchment and cliques, welcoming newcomers and sharing the Association's history and traditions. Encourage collaboration through interactions such as networking events, inter-association exchanges, advisory committees, legislative advocacy, and participation in regional and national associations.

4. Enhancement of professional, personal, and leadership development

- A. GOAL:** Ensure that the Association provides quality training to enhance the knowledge and competency of the membership.

OBJECTIVE: Provide relevant, engaging, innovative, accessible, and cost-effective professional and personal development opportunities that cover financial aid basic and advanced topics, current regulatory and legislative issues, technological advances, human relations, and student development.

- B. GOAL:** Ensure effective, continuative leadership of the Association while promoting the development of future leadership that fosters energy, diversity, and inclusivity.

OBJECTIVE: Provide opportunities for volunteerism at all levels to help identify members with leadership aspirations and capabilities. Recognize outstanding performance and nurture emerging leaders. Explore and expand initiatives such as sponsoring members to attend leadership symposiums, forming a leadership pipeline, and implementing a chair-in-training program.

- C. GOAL:** Ensure a successful transition of the Association's leadership.

OBJECTIVE: Annually organize a successful transition of leadership in which out-going Board members share complete records, reports, and calendars. New Board members are thoroughly prepared and able to acknowledge an understanding of their duties and the Association's governing documents and budget.