

SDASFAA EXECUTIVE COUNCIL MEETING MINUTES

Monday, April 30, 2018 * 8:30-11:30 AM CST Huron Event Center, Huron, SD

Executive Council Members

Beth Vollan (SDSU) Preside	CIII
Erin Richards (SDSM&T)	
Becky Pribyl (NSU) Past-Preside	ent
Melinda Fedeler (DSU)	
Carrie Jordanger (LATI)Treasu	
Julie Pier (USD) and Marlene Seeklander (LATI)Members at Large through 20)18
Melissa Simpson (BHSU) and Amber Brockel (PC)Members at Large through 20)19
Lucas Winterberg (BND)	rge

Call Meeting to Order

Beth called the meeting to order with all members present and Ken Kocer a guest representing RMASFAA.

Introductions

With this being the first meeting for new member, Amber Brockel, everyone introduced themselves.

Approval of Agenda

Marlene made a motion to approve the agenda, second by Erin. Motion carried.

Officer Reports - Consent Agenda

Melinda made a motion to approve the consent agenda reports, second by Amber. Motion carried.

Past-President (Becky Pribyl)

Ad Hoc Committee for Archiving

Established: April 2018

Committee: Melinda Fedeler – Chair, Kristy O'Kief, Sharon Kienow, Deb Henriksen and Carrie Jordanger

Charter:

- Locate and identify SDASFAA's physical possessions/records
- Locate and identify SDASFAA's electronic records
- Evaluate electronic storage options
 - On website (is there enough storage space)?
 - Within Yahoo group?
 - o Thumb drive?
 - Combination?
- Evaluate and update archive policy
 - o Are we archiving everything we're supposed to?
 - o Who has access?
 - o Are our archives current?
 - Should we add an Archivist position, either on the Board or as part of the Web Committee?
 - Consider RMASFAA's updated archive policy (P&P p28) and document storage breakdown (attached) for ideas
- Dispose of physical items that are duplicates or are not needed
- Convert physical items to electronic where possible

Thoughts generated at the Board Meeting: An email could go out prior to the spring conference to ask people to search their storage areas and either bring their SDASFAA items to the conference or bring a list of what they have for the committee to start identifying/collecting. SDASFAA's 50th anniversary is coming up in 2020 and that might be a good time to display physical memorabilia/let people take what they want that we decide not to keep.

2018 Spring Conference

The conference will be held in Huron, SD, at the Huron Event Center and Crossroads Hotel, April 30 – May 2, 2018. The committee has held conference calls every few weeks since February to keep everything on track. Registration opened 6 weeks prior to the conference and the full program was posted online 4 weeks prior. Any materials will be made available to registrants electronically the week prior. Currently, we have 39 people registered to attend. The Conference Committee includes Lindsay Miller, USD; Denise Grayson, DSU; Katie Nelson, BHSU; Morgan Huber, MTI; Kim Nida, BHSU; Beth Vollan, SDSU; and myself.

2018 Recognition Committee

This committee is responsible for recognizing individual member's service at the SDASFAA Spring Conference and for putting together the slate of candidates for the election later this year. Thank you to everyone who submitted nominations for our Outstanding Service Award and the Douglas Steckler Professional Development Award, and to the Board for voting on the recipients. The award plaques, along with the 12 years of service plaques, have been created by Academy Trophy of Aberdeen. They will be handed out at the awards banquet Tuesday night in addition to about 15 certificates. After that, the committee will turn our attention to looking for candidates to fill Executive Board positions for 2019. This committee is composed of Beth Vollan, President; Micah Hansen, Past President; and myself, Past President.

Thank you for this opportunity to represent and serve SDASFAA. This is a tremendous experience and I have learned so much!

President-Elect (Erin Richards)

NASFAA Leadership and Legislative Conference

I am so thankful to have had the opportunity to participate in the NASFAA Leadership and Legislative Conference in Washington DC in February! I attended the association management pathway, which had great sessions about association governance, leadership planning, and volunteerism. The presenters were financial aid leaders from across the country and were very open with sharing their own experiences, knowledge, and tips. I also appreciated the opportunity to network with upcoming leaders from other states as well, to discuss challenges we face and ideas for how to overcome them. At the conclusion of the conference, I was able to make a visit to Capitol Hill. I met individually with staff members from the offices of Senator Thune and Senator Rounds to talk about the importance of federal student aid programs to South Dakota families. Overall, it was such a positive, empowering experience, and I was proud to represent SDASFAA!

Decentralized Training Committee

Chairing the 2018 Fall Decentralized Training Committee has been a great experience so far. The other committee members are Mary Alexander (DWU), Amber Brockel (PC), Marlene Seeklander (LATI), and Melissa Simpson (BHSU).

The training is scheduled for Wednesday, November 14th – Thursday, November 15th at the AmericInn in Chamberlain. They will offer us the same rate and terms as last year's event. The dates were selected so that the training would occur after Veterans Day and before Thanksgiving. However, it has been brought to our attention that the SD state institutions, which are currently undergoing a software conversion process, are tentatively scheduled for onsite training that week, as well as the week prior. I would appreciate input on the potential impact on Decentralized Training if/when these tentative software training dates for the state schools become official.

For programming, we are planning to offer the NASFAA Direct Loan credential. The 2018-19 materials are now available from NASFAA. The cost to purchase the training is \$500. Our next steps include purchasing the materials from NASFAA and selecting instructors who will work on obtaining the credential in advance.

Membership Committee

As chair of the 2018 Membership Committee, I think that we are off to a good start so far this year with committee members Diane Borchardt (GLHEC), Tracey Buisker (SDSU), and Julie Forman (LATI). We have welcomed two new SDASFAA associate members: First PREMIER Bank and the South Dakota Community Foundation. We have not received membership dues from Inceptia; when we contacted them, they indicated that were not certain if they would renew their membership for 2018. We also contacted Sinte Gleska University about their dues not being received; they said that they would be mailing their check.

Additionally, our committee has taken over maintenance of the membership spreadsheet from the Committee of Record, so we have been updating the spreadsheet and then sending to the Committee of Record and Website for posting to the SDASFAA website. A big thank you to Kristy O'Kief for being so helpful and prompt with making these updates!

President (Beth Vollan)

2018 High School Counselor Workshops

Tom Cool, Executive Director for CCASD, recently confirmed the following 2018 dates for the High School Counselor Workshops. Tom Cool:

Sept. 5: Aberdeen, NSU Sept. 11: Pierre, Capitol U Center

Sept. 6: Watertown, LATI Sept. 10: Mitchell, MTI Sept. 10: Rapid City, SDSMT or WDTI Sept. 13: Sioux Falls, STI

The site for Rapid City is still listed as to be announced. Currently, Sharon Martin is listed as the site chair for Rapid City. If the actual site is SDSMT instead of WDTI, then Erin Richards will be the site chair. I have asked Tom Cool to let us know as soon as he finalized the Rapid City venue. The current agenda has the financial aid presentations from 12:00 to 2:30.

The 2018 High School Counselor Workshop Committee will meet at the spring conference.

2018 Spring Conference

As a member of this committee, I have been helping with registration and acting as liaison to the Committee of Record and Website. Co-chairing this committee has been a great learning opportunity and has helped prepare me to chair next year's conference committee.

2019 Spring Conference

Spring 2019 conference will be held in Deadwood at the Lodge. The dates are Monday April 15 through Wednesday April 17, 2019. The contract has been signed with catering prices fixed to the 2017 catering menu. The 2019 Conference Committee will hold its first meeting at the 2018 conference.

RMASFAA Board Update

Last month I represented SDASFAA at the RMASFAA Winter Board meeting in Denver. In his report from the NASFAA Board meeting, Ken Kocer reported that NASFAA plans to discontinue the practice of allowing state and regional associations to offer free credential vouchers to attendees of NASFAA Authorized Training Events. Consequently, when SDASFAA conducts credential training at our conference or Decentralized Training, the participants will have to pay to take the credential exams. I believe this new policy will be effective with the 2019-2020 academic year.

I am so grateful for the opportunity to serve as SDASFAA President and as our state delegate to the RMASFAA Board. This has been a great professional development experience for me.

Officer Reports

<u>Treasurer</u> (Carrie Jordanger)

A deposit was made on April 29th that is not reflected in the attached reports. The South Dakota Community Foundation has paid their dues and will be attending the spring conference. Sinte Gleska's check for dues was returned due to bad address so they will resend. Inceptia will not be renewing their membership.

	•	ot be reflewing their members	ornp.
2018 SD	ASFAA Assets YTD		
		Savings Balance She	et
	Beginning Balance		\$ 22,929.26
	Interest Income		\$ 4.52
	Transfers		\$ -
	Ending Balance		\$ 22,933.78
	(personal savings acct, no	fees, 0.05% interest, \$300 min. bal.)	
		ODIa Dalamas Chast	
		CD's Balance Sheet	
	CD - US Bank		
	Beginning Balance		\$ 31,641.46
	Interest Income		\$ -
	Ending Balance		\$ 31,641.46
	(purchased 5/30/14, matur	res 4/30/19, 59 months, 1.73%)	
		Balance Sheet Summar	ТУ
	Checking Account		\$ 8,578.16
	Savings Account		\$ 22,933.78
	CD - US Bank		\$ 31,641.46
	Total Available Asse	ts	\$ 63,153.40

	ASFAA Balance Sheet YTD			
BEGINNII	NG BALANCE			
	Checking			3,765.81
INCOME				
	Membership Dues		2,625.00	
	Sponsorship Income		2,950.00	
	Workshop Income		2,280.00	
	Spring Conference	2,280.00		
	Support Staff Workshop	0.00		
	Decentralized Training	0.00		
	High School Counselor Workshop	0.00		
	Miscellaneous Income		0.00	
TOTAL IN	ICOME			7,855.0
EXPENSE				
/(,/()	Workshops		400.00	
	Spring Conference	400.00	100.00	
	Support Staff Workshop	0.00		
	Decentralized Training	0.00		
	High School Counselor Workshop	0.00		
	Executive Board	0.00	0.00	
	Travel		2,342.75	
	NASFAA Leadership Conference	2,342.75	,-	
	RMASFAA Board Meeting	0.00		
	RMASFAA Conference	0.00		
	Education Activities		266.25	
	Review Committee	0.00		
	Membership Committee	0.00		
	Committee of Record	0.00		
	Recognition Committee	266.25		
	General Postage		0.00	
	General Printing		0.00	
	Memorials		0.00	
	Miscellaneous Expenses		33.65	
TOTAL E	XPENSES			3,042.6
TOTAL T	RANSFERS			0.0
· · -	Savings		0.00	
	CD's		-	
ENDING I	BALANCE Checking			\$8,578.16

Unfinished Business

2018 SDASFAA Spring Conference (Becky Pribyl)

See report in Past President report. There are 44 registrants. Lots of emails and phone calls by committee members to prepare for this week. Put together a strong agenda. Beth commended Becky and her committee for their work.

Archive Ad Hoc Committee (Becky Pribyl)

See report in Past President report. Melinda will chair with help from Deb Henriksen, Sharon Kienow, Kristy O'Kief and Carrie Jordanger. Becky gave a brief description of the committee charge. Carrie brought several boxes of Treasurer documents for the committee to review. She has several more.

Decentralized Training (Erin Richards)

See report in President-Elect report. Committee is planning the training for November 14-15 at the Americann in Chamberlain. Would like to present the NASFAA Direct Loan credential session, but it is a longer session so they are working with NASFAA. The 2018-19 training materials available now and the cost is \$500. Planning the usual SDASFAA Board meeting the morning of 14th (Wednesday) before training at the same location. Right now the November dates conflict with Banner training for the state schools so we will check on the Banner schedule and may need to adjust dates to end of October. The Banner schedule has been very fluid.

Long Range Plan (Board Discussion)

Beth prepared a draft SDASFAA Strategic Plan and provided examples from KASFAA and RMASFAA. Discussion held about the importance of a strategic plan and the consensus was it is a good idea. We will create a committee, chaired by Beth, to take the draft and refine it into a final plan. Committee should have a mix of membership knowledge and represent all sectors. A rough draft should be ready to present at the summer Executive Council meeting when we conduct our review of the policy and procedures manual. Motion by Becky to create an ad hoc committee to create a strategic plan for the organization, second by Carrie. Motion carried. Melissa volunteered to be on the Strategic Plan Ad Hoc Committee. See attached SDASFAA Strategic Plan 2019-2021.

Five-Year Review of Policy and Procedures Manual (Beth Vollan)

Review of the SDASFAA Policy and Procedures Manual was last done in 2013 during a combined 2-day Executive Council work session/Board meeting. The same format may not work this year with the state schools involved in Banner training and testing that requires them to be in Sioux Falls 3 days a week for 2-3 weeks each month. Beth's plan is to have a 1-day in-person session and then another day via WebEx or DDN if needed. She will send out a survey with potential meeting dates in July and August.

2019 SDASFAA Spring Conference (Beth Vollan)

See President report. The 2019 SDASFAA Spring Conference will be held at The Lodge in Deadwood April 15-17. There is a new contact person at The Lodge, Bobbi. The spring conference committee will be meeting tonight.

New Business

RMASFAA Board Update (Beth Vollan)

See President report. Ken Kocer, RMASFAA President, spoke about a proposed collaborative effort between NASFAA and RMASFAA regarding membership activities. NASFAA President Justin Draeger is proposing the same collaboration opportunity to SWASFAA (tried to collaborate with all regions a few years ago but they could not all come to an agreement). RMASFAA decided that Ken should visit each state association and speak to the leadership about the collaboration proposal, then get their vote on whether or not RMASFAA should collaborate with NASFAA. The intention is to take some of the workload from the regional associations by having membership activities performed by NASFAA. There would be one membership rate which would make the entity a member of both organizations. RMASFAA could gain up to 37 members as there institutions who are NASFAA members but not RMASFAA members. There are 12 SDASFAA members who are not NASFAA members and could potentially be lost. Proposing no more membership tiers for dues, just one rate. NASFAA would collect the dual dues and send the regional portion to RMASFAA. Details:

- 1) Eliminate RMASFAA membership committee as membership would be taken care of by NASFAA.
 - a. Pro less work for RMASFAA
 - b. Con less opportunity for members to be involved
- 2) No more RMASFAA web site as it would be part of the NASFAA web site.
 - a. Pro less work for RMASFAA
 - b. Con have to use NASFAA templates and need a committee to work with site
 - c. Pro no cost for web hosting
- 3) Event registrations would go through the NASFAA web site, including payments
 - a. Pro less work for RMASFAA

- b. Con receivables would go through NASFAA so RMASFAA may not need Treasurer-elect position, which again eliminates a volunteer position for leadership opportunity
- c. RMASFAA still needs to plan and work events

RMASFAA does not have the volunteer and membership issues other regions have (others are having a hard time getting Board and committee volunteers and recruiting and keeping members). RMASFAA and SWASFAA are both institutional membership regions whereas other regions use individual memberships which can't work with this model. RMASFAA was chosen as a strong organization both in membership and financially. SWASFAA was chosen as a struggling organization needing help with membership.

Beth said there were people on both sides of the fence at the RMASFAA meeting. Some people were against the proposal thinking NASFAA had a hidden agenda, others thought it was a great idea, and a few people were in the middle who needed more time to consider.

Things for SDASFAA to consider:

- 1) If it doesn't work, we have dismantled the membership committee and web site; can we get all that back easily?
- 2) This will require a 3-year contract with NASFAA.
- 3) Could less RMASFAA volunteer opportunities mean more people volunteering at the state level?
- 4) People can still participate in RMASFAA events if they are not a NASFAA member, just pay the higher non-member rate.
- 5) Associate members would have to pay a LOT more for NASFAA dues. Would they contribute to RMASFAA or SDASFAA sponsorships if they are paying more for NASFAA dues or would we lose that support?

NASFAA will create an average of all RMASFAA dues tiers to create a single fee tacked on to NASFAA dues, with that amount to be given back to RMASFAA. NASFAA is hoping regions will be able to do more with their resources since the collaboration is expected to free up human and financial resources. NASFAA wanted to have a decision in March to sign a contract in April and go live in May, but Ken told Justin Draeger that would not work and he has heard nothing since. Ken wanted time to visit with each state. He does not have anything in writing from NASFAA to show members. Ken has been talking with leadership from other states and getting their input. Much discussion held around the table. Do we have to decide now or can we go back to NASFAA in the future if we wanted to do it later? Ken is not sure. Let's bring the proposal to voting members by email since they are not all at the conference. Beth will send an email and get a vote.

For 2019-20, NASFAA is changing the way associations purchase credentialing sessions. They will charge \$300 for the training materials and individuals must pay for their own credential test, no more vouchers will be given to attendees for a free test. Lucas mentioned we need to communicate this change with members sooner rather than later for budgeting purposes. Discussed the option for RMASFAA to hold credential sessions in states. RMASFAA is not interested right now, but there may be some collaboration opportunities in the future. Sessions must be done in person; no more webinars.

Review committee report (Lucas Winterberg from Kim Nida)

There was discussion as to why the 2016 High School Counselor Workshop expenses were so much greater than 2017 expenses when we were utilizing the same format in conjunction with DACAC for both years. Katie explained that, while we will continue to have travel expenses for the Pierre site, the other expenses in 2016 included printing of materials and the folders that were purchased to be used at the HSCW. In 2017, the training materials were made available online so counselors could access them at their convenience, either for the workshop or other purposes. The folders will be used for additional information made available to the counselors, such as items from our associate members, and as a promotional item from SDASFAA.

A few comments were made in regard to the spreadsheets utilized by the treasurer to keep the financial records of SDASFAA in order. For the HSCW, we will continue to track the income, expenses, and number of attendees, but is it necessary to track the cost per attendee in our current setup? We offer this as a suggestion for board discussion. In regard to the spring conference spreadsheet listing the attendees and cost, we recommend always including an explanation if the rate charged is different than the regular rate (ex: one-day rate).

Discussion held on whether or not we need HSCW sheet to track site information. Decided to have Carrie track what she feels is necessary and meaningful.

Committee of Record & Website report (Carrie Jordanger with Micah Hansen and Kristy O'Kief)

The committee of record meet via conference call on February 23rd to start the process of looking into new web formats. Kassandra had asked that we send her suggestions on what we would like to see in the website. Kassandra resigned effective March 29th and our discussions have not continued at this time.

Carrie Jordanger

I am really not sure what I am supposed to be doing on my assignment for the committee of record but I did a little snooping at what other associations have for website content and I really like the simplicity of the NDASFAA website. (It could use a few more pictures.) They have a home page, training and conference page, governance, listserv, directory, forms, recognition, resources, and scrapbook. I think we could combine recognition and scrapbook into one page.

Kristy O'Kief

Thank you for the feedback. I also like the simplicity of their website. My wish list for the website:

- 1. Easy to create;
- 2. Easy to maintain;
- 3. Easy to learn how to make updates so more members have that capability;
- 4. Storage for archived documents;
- 5. Membership list on website and not a spreadsheet;
- 6. Creating registration for training directly through web instead of having to use jotform.com;
- 7. Creating a listserv directly within the website instead of having Yahoo Groups

I'm sure I will probably have more for the wish list but it's the end of the day and my brain is tired.

Micah Hansen

Morning Carrie and Kristy,

Thank you both for the input you have given on the website – it is a great way to start to focus the search for the right platform/product for our site! If you have not been informed yet I wanted to let you know that Kassandra will no longer be a SDASFAA member as of March 29th, but we have another SDSU member to join our group that will be great. Sydney Chapman is taking her place, and we will get her in on our discussions and work soon.

The committee needs more help/members with Kassi gone. Hoping to find a new web site platform that is more user-friendly as now they have to update/maintain pages with HTML coding. Once the web site gets a new platform, it will take a lot of work to get the site set up, but it will be easier to maintain. Micah Hansen and Sydney from SDSU will now serve on the committee. Micah knows HTML and is willing to spearhead the conversion. May be able to split up pieces of the site. Committee needs time to research platform options, but Kassi thought it would be an option to stick with GoDaddy and use a different platform with them as they offer multiple platform options. Beth will put a note in the monthly newsletter to ask for volunteers for the committee that have HTML or web site maintenance knowledge.

ISIR info sharing with scholarship providers

Marlene is suggesting we send out a letter to housing assistance agencies and scholarship foundations that we all work with letting them know of the new federal guidelines prohibiting schools from providing student financial aid information directly to non-federal agencies. Forms need to be given directly to students now and they have to provide them to the agency. Marlene will put together a draft letter to send to the Board for approval to be distributed to membership for individual institution usage as they see fit. (sample attached)

Promoting Mapping Your Future Services

Should SDASFAA provide information to high schools regarding Mapping Your Future (MYF) services now that Great Lakes is no longer sending staff to schools for FAINs? It was suggested to add a slide to our HSCW presentation regarding MYF services. Should we send a letter to high schools or the DACAC listserv in May and August promoting MYF services? Beth will put together a draft letter that can be sent to high schools from SDASFAA and schools, she will also contact Tom Cool to see if he will distribute it. She will contact Cathy Mueller to see if there is a flyer or brochure that can be sent with the letter/email. Hub City Radio and iHELP are doing joint evening sessions on what to do next with the financial aid award letter in Aberdeen. Sessions are basically a FAIN for the community instead of having individual FAINs at high schools. Lucas reported BND is hosting webinars and Facebook Live sessions with FAFSA help. Facebook Live sessions are not popular, but webinars are going well. They have live help on the webinars to answer questions.

SDSAFAA Banking Locations and Options

Micah and Katie are on the US Bank checking account. There is no US Bank location in Watertown for Carrie to visit personally. Before we change over to Carrie, Beth and Erin as signatories, do we want to change our account to a bank that has a location in Watertown? Carrie has been having good luck with electronic deposits and mailing checks for deposit that won't scan. She does not see a need to change banks for necessity unless the Board wants to change banks. The consensus was to leave the accounts as they are.

Other – Board decision by email prior to the meeting

First PREMIER Bank in Sioux Falls submitted a membership application in February. The application was reviewed by the Board. On February 8th Marlene made a motion to approve First PREMIER Bank's application for membership. Melinda seconded the motion, motion carried by email vote after a discussion period.

In order to get the signatories changed on the SDASFAA bank account, the Board reviewed the February minutes by email instead of waiting for the next Board meeting. On March 12th Marlene made a motion to approve the revised minutes of the February SDASFAA Executive Council minutes. Julie seconded the motion, motion approved by unanimous email vote.

On March 20th, Kassandra Boyer submitted her resignation to the Executive Council as she has accepted a new position with the USGS. On March 26th Beth sent a notice that Amber Brockel from Presentation College was willing to fill the vacant Member-At-Large position that expires in 2019. Marlene made a motion to approve the appointment of Amber Brockel to fill the vacant Member-At-Large position vacated by Kassandra Boyer. Second by Melissa, motion carried after discussion.

On April 13th Carrie received a membership application from the South Dakota Community Foundation in Pierre. The application was reviewed by the Board and Melinda made a motion approve the membership application from SDCF. Melissa seconded the motion, motion carried by email vote.

Announcements

- a. RMASFAA Summer Institute June 3-8, 2018 Colorado Springs, CO
- b. Summer 2018 Board Meeting—Date, Time, and Location TBD
- c. RMASFAA Conference October 7-10, 2018 Fargo, ND
- d. Fall 2018 Board Meeting—Wednesday November 14 2018 Chamberlain, SD
- e. Decentralized Training—November 14 and 15, 2018 Chamberlain, SD

SDASFAA Strategic Plan 2019 to 2021

With the goal of remaining a viable and effective organization, the SDASFAA Board has adopted a three-year strategic plan. The plan's purpose is to ensure that SDASFAA continues to meet the needs of its members while focusing its efforts on initiatives that align with its purpose. The plan recognizes the need for SDASFAA to remain financially strong and to promote volunteerism and leadership development within its membership. The strategic plan is designed to serve as a guide for the SDASFAA officers, board members, and committee chairs and volunteers. The plan focuses on four areas

- **1. Support and promote financial aid training** One of SDASFAA's primary purposes is "to promote standards of professional preparation" for its members and others. To that end, SDASFAA works to provide quality training opportunities to enhance the financial aid knowledge of its members and other who work with student financial aid. SDASFAA does that by
 - Holding an annual conference with training conducted by members, U.S. Department of Education officials, RMASFAA and NASFAA representatives, and others as appropriate.
 - Holding a fall training event that focuses one or more financial aid topics
 - Hosting NASFAA Authorized Training in conjunction with SDASFAA conference/training events to facilitate NASFAA credentialing for its members
 - Supporting financial aid training of high school counselors at High School Counselor Workshops
- **2. Facilitate communication to and amongst the membership** SDASFAA recognizes the value of open exchange of ideas, information, and best practices. SDASFAA encourages communication by
 - Supporting a listsery to facilitate questions and discussion amongst members
 - Maintaining a website that houses information about SDASFAA
 - Providing networking opportunities in conjunction with conferences and events
 - Providing regular communications from the Executive Council to the membership
- 3. **Ensure that SDASFAA has a competent volunteer base** Since SDASFAA is run by volunteers, it recognizes the importance of having members who are willing and able to serve on committees and the Board and to take on leadership roles. SDASFAA facilitates this by
 - As financially feasible, providing scholarships to members who are Leadership Pipeline mentees
 - Provide funding for SDASFAA President-Elect and Treasurer-Elect to attend the Association
 Management track at the NASFAA Leadership Conference
 - Encouraging new members to participate in committees
 - Whenever possible, encouraging a mix of new members and experiences members to run for positions on the Board of Directors
- **4. Ensure that SDASFAA remains financially strong** SDASFAA recognizes that sound financial management is needed to keep the association viable and functioning. To encourage a financial stable organization
 - The SDASFAA Board will analyze the SDASFAA's expenses, income, and reserves, and recommend the amount or percentage of expenses SDASFAA should maintain in its reserves
 - Develop annual budgets that seek to maintain reserves at recommended levels
 - Regularly review conference fees to ensure that the expense of holding events is not outpacing the income generated from the events.

SAMPLE LETTER TO OUTSIDE AGENCIES REQUESTING STUDENT FINANCIAL AID INFORMATION



May 18, 2018

The Department of Education's Privacy and Technical Assistance Center (PTAC) recently released information prohibiting schools from sharing FAFSA information directly with certain third-party entities, even with a student's written release of information.

As a result, some of the colleges you work with are going to complete your form and return it to the student to provide to you. Please understand that schools are trying to comply with the guidance they have received. Other colleges may handle the forms in a different manner, based on their interpretation of the Department of Education's guidance.

As an association, SDASFAA wanted to provide this notice to you. Please let us know if you have questions or concerns about this new information sharing policy. We're here to help!

Sincerely,

Beth Vollan 2018 SDASFAA President

Email: beth.vollan@sdstate.edu

Phone: 605-688-4697