

Agenda: NeASFAA Board of Directors Meeting

March 24th, 2021

Zoom Link: <https://unk.zoom.us/j/92366308305>

NeASFAA's Strategic Direction:

Promote Professionalism	Train and Develop	Coordinate and Network	Influence Legislation
------------------------------------	------------------------------	-----------------------------------	----------------------------------

NeASFAA Board Participants

Board Members		Committee Chairs & Other Guests	
President	Renee Besse	Association Governance	Sheila Johns
President-Elect	Justin Brown	Corporate Development	Robb Cummings
Past President	Sheila Johns	Finance and Audit	Susan Frodyma
Treasurer	Lisa Gdowski	Membership Connections	Erinn Brown
Secretary	Sarah Standley	Nominations and Elections	Justin Brown
4-Year Public	Sheila Pourier	Professional Development & Recognition	Kimberly Vanosdall
2-Year Public	Kimberly Vanosdall	State and Federal Relations	Ritchie Morrow
Private	Susan Collins	Historian	Ritchie Morrow
Associate Sector	Jodi Vanden Berge	Guest: Training 2020 Ad Hoc Committee	Mary Sommers

Call to order at 9:30am

	Agenda Topic	Objective	Discussant/Time
1.	Approval of the Agenda	Decide: Entertain a motion/discuss/vote.	Renee B./5 m
2.	Approval of January 2021 Minutes	Decide: Entertain a motion/discuss/vote.	Renee B./ 5 m
Business on the Table			
1.	Microsoft Business Basic – Document Storage Update	Purchased. Moving forward update	Ritchie M./10m
2.	Spring 2021 Conference -Update	Discuss	Kim V./10m
New Business			
1.	21-22 Budget Approval	Motion/Discuss /Decide	Susan F./15m
2.	Sponsor Activity at Wyobraska Conference	Motion/Discuss/Decide	Kim V./10m
3.	NeASFAA Investments	Discuss	Justin/15
4.	New Membership – Earnest	Motions/Discuss/Vote	Erinn/10
	Adjournment	Decide: Entertain a motion.	Renee

Agenda: NeASFAA Board of Directors Meeting

March 24th, 2021

Zoom Link: <https://unk.zoom.us/j/92366308305>

Stages of Group Problem-Solving: Define, Discuss, Evaluate, Decide

NeASFAA Board of Directors Meeting
Wednesday March 24, 2021
Conducted via Zoom

Attendance:

Present: Renee Besse, Justin Brown, Sheila Johns, Lisa Gdowski, Sarah Standley, Sheila Pourier, Kimberly Vanosdall, Susan Collins

Committee Chairs/Members also in attendance: Robb Cummings, Erinn Brown, Erika Kampschneider, Susan Frodyma, Matthew Johnson

Not Present: Jodi Vanden Berge, Ritchie Morrow

Call to order: Renee called the meeting to order at 9:31am.

Approval of Agenda: Motion to approve by Lisa, second by Susan C. Addition to agenda made by Renee regarding Treasurer's report. Amended motion carries.

Approval of January 2021 Minutes: Motion to approve by Justin, second by Kim. Motion carries.

Approval of March 2021 Special Meeting Minutes: Motion to approve by Lisa, second by Justin. Motion Carries.

Business on the Table:

Microsoft Business Basic: Sarah gave update on where we are with document storage and what it will look like. Did a quick tour of the new space. We plan to continue using Dropbox until we officially transfer over, maybe next month. We will need to do a training to get everyone's access set up and get everyone used to using it. After the training, Sarah will migrate all the documents over, and we still stop using Dropbox.

NeASFAA Spring Conference 2021: Things seem to be going smoothly! 130 attendees, 25 first time attendees, a lot of associate members (12). Good things seem to have come from going virtual! Everything is ready to go.

New Business:

Sponsor Activity at Wyobaska Conference – Matt had an idea of sponsoring an activity! We could sponsor a break maybe. We will likely be limited with what we do for fall training since the RMASFAA conference will be in Omaha, so it would be nice to contribute somehow. We might need to add a line item in the budget if we do want to sponsor something. We could do a travel stipend or scholarship or something for an institution. Matt suggested we could give some kind of swag when people come by to register in person, or NeASFAA could provide a session. We also discussed RMASFAA state gift, some institutions can't accept gifts any more, it seems like we might be moving away from this tradition. We might need to get a new banner for the RMASFAA conference with our new NeASFAA logo. Justin makes a motion; on the proposed 21-22 budget, he moves to change the line item from "RMASFAA State Gift" to "RMASFAA Support", and change the amount of support to \$625 as a one-year increase, Susan P. seconds. Discussion: \$625 might be enough to support a snack or beverage break or something, or it might be enough to provide registration for a member if we decide to do a travel voucher or scholarship for someone. We can leave it open ended so future boards have flexibility to do with this fund what they

want, based on what RMASFAA needs. Susan F. brought up the point that this budget variance might not be an annual thing; might be just a one time fund for whenever RMASFAA is held in Nebraska. Motion carries.

21-22 Budget Approval – Susan F. has stepped in as Finance and Audit chair. We made the budget line item update for RMASFAA support (as discussed in last item). Motion to approve this 21-22 budget by Kim, second by Susan C. Discussion: Renee proposes to change the due structure since budgets are tight. She reduced the due for schools who have student body from 1-999 by \$25, and increased the top two tier institutions with student body from 10,000-19,999 and 20,000+ by \$100 each. This membership due structure is reflected in the proposed 21-22 budget. Matt wanted line item in the budget for potential virtual conferences/trainings to remain for future budgets since the virtual training opportunities have gone over pretty well. The \$700 value for this reflects two months of zoom access at \$350 per month. Discussion about credentialing. In the start of 19-20, we decided to have credentialing for 19-20 but to suspend for 20-21 because of low attendance, difficulty finding instructors, and RMASFAA conference in 20-21. We need to make some decisions regarding credentialing for 21-22 and how we want to move forward with credentialing opportunities in the future. We are leaving the budget line item in so we don't have to do another variance if we decide to offer credentials again. Justin proposes some taskforces for upcoming year. One is for Safety, and Paula K will lead it. Safety committee would be responsible for assessing in person activities and making sure safety is considered. This would involve determining amount of masks, PPE, gloves, face shields, etc. needed. Sarah S will continue with taskforce about admin business and migrating documents/training members on using the new Office 365 platform. There will be another taskforce led by Becca regarding FAFSA simplification and disseminating information about FAFSA simplification as it comes out as well as sharing best practices across the state. Motion carries.

NeASFAA Investments: As Justin was looking through the budget, we noted that our CDs will be coming due this year. We essentially have \$140,000 in savings and checking. Our policies require that we have at least 50% of our annual budget in reserves. We pretty much have 5 times the amount of reserves we need. We could potentially be utilizing these reserves better for the long-term stability of NeASFAA. Justin had some ideas about investing our reserves in something that produces more interest income than our CDs do for our next go around. NASFAA actually offers advice for investing. He set up a meeting with them to talk through our goals and options. Justin's makes a motion to transfer the CDs into checking for now with the idea that by the end of this year, we will have a decision made on how to move forward with our investments. Lisa seconds. Discussion: Lisa said the 9 month CD is going to make only \$5 in interest. We only made around \$11 in interest total for the whole 2020 year, so we could be doing a lot better! Sheila brought up that we may not want to put all of our money in one spot; she proposes we may want to extend our CDs until a decision is made regarding investments rather than putting all of our money into checking. Justin amends his motion to only address the CD (US Bank) that is coming due in April; we can put that CD in checking for now and not make any final decisions regarding the remaining CDs until the next board meeting. Susan C. seconds. Motion carries. Justin also advises that we should amend our audit and finance policy to advise against keeping all of our money in one place.

New Membership Request from Earnest: They are a student loan refinance organization. We assume she wants to be a member so she can register for the spring conference. Motion by Sheila J. to approve membership. Second by Lisa. Motion carries. Earnest is now a member and will be at our conference!

Adjournment: Motion to adjourn by Justin. Meeting adjourned at 11:19am.

Next Board Meeting:

June 2021 - Zoom

March 26, 2021
NeASFAA Spring Conference
Two-Year Public Sector Annual Report

I attended each of the Board meetings during 2020-2021. Prior to each meeting, I contacted the members of the Two-Year Public Sector to ask for any staff changes or celebrations, and concerns/questions I could bring to the Board. I received some responses of staffing changes and information to take to the Board regarding professional development budgets.

I hosted three zoom meetings over the year to discuss COVID19, HEERF funds/reporting and FAFSA completion. I also served on the Nominations & Elections Committee and chaired the Professional Development & Recognition Committee.

I have enjoyed the past two year and learned so much. I'm looking forward to next year as NeASFAA President Elect.

Respectfully Submitted,

Kimberly Vanosdall

NeASFAA Board Meeting
March 24, 2021
Two-Year Public Sector Report

In the beginning of March, I sent a request for updates to the Two-Year Public Sector members. I received responses of no changes. I also asked members about their professional development budgets and possible need for a scholarship to attend future NeASFAA trainings. Most responded their professional development budgets were not drastically cut and they would continue to attend NeASFAA training.

Respectfully Submitted,

Kimberly Vanosdall, Northeast Community College
Two-Year Public Sector Representative

NeASFAA Board Meeting
Association Governance Committee Report
March 24, 2021

There were no meetings nor activity of association governance to report during this period.

Respectfully submitted,

Sheila Johns
NeASFAA Past-President and Association Governance Chair

NeASFAA Board of Directors Meeting
Friday January 15, 2021
Conducted via Zoom

Attendance:

Present: Renee Besse, Justin Brown, Sheila Johns, Lisa Gdowski, Sarah Standley, Sheila Pourier, Kimberly Vanosdall, Susan Collins, Jodi Vanden Berge

Committee Chairs/Members also in attendance: Robb Cummings, Laura Thayer-Menke, Erinn Brown, Ritchie Morrow, Erika Kampschneider, Susan Frodyma, Diana Oglesby, Mary Sommers, Matt Johnson

Not Present: Everyone is here!

Call to order: Renee called the meeting to order at 9:00 a.m.

Approval of Agenda: Motion to approve by Lisa, second by Justin. Motion carries.

Approval of October 2020 Minutes: Motion to approve by Kim, second by Sheila. Motion carries.

Approval of December 2020 Minutes: Motion to approve by Lisa, second by Sheila. Motion carries.

Business on the Table:

Microsoft Business Basic: We have everything set up, and there are now email accounts for the President, Secretary, Treasurer, Membership Coordinator, and PDRC chair. We're going to have a training after the meeting to learn how to use everything!

NeASFAA Spring Conference 2023 site/contract: We have bids from Ramada in North Platte and Younes Conference Center in Kearney. Tried to get a bid from Scottsbluff, but they haven't been very responsive. We also got a bid from Ramada Midtown in Grand Island. Kearney and GI prices are very similar. The Committee is recommending that we go with Ramada GI. Justin makes a motion to approve the committee's decision to go to Grand Island for the NeASFAA 2023 Conference March 15-17 2023. Second by Susan C. Sheila. Motion carries.

New Business:

Membership Voting Member Changes – Justin proposes to potentially have a Teams channel or something similar with all of the voting members for each institution so we can keep it clear on who the voting members are. Robb brought up that it's also challenging to keep up with associate members as new ones come on and as people leave.

Regarding the listserv, discussion on how we can keep track of the listserv in a good way; adding and removing members as they come and go. It's also hard to make sure all of the members of a financial aid office are on the listserv; decision was made that the directors should be responsible for this. Discussion about keeping retired folks on the listserv or not. When we lost Linda earlier, the retired members who were on the listserv really appreciated the update. It was brought up that the listserv is nice for free advertisement for NeASFAA, even if some of the people on there are technically not members. Erinn will discuss with membership on these items. Also now that we are going to Microsoft Business Basic, there might be new tools we aren't even aware of that will open up new opportunities and solutions for these problems.

Audit Completion: The audit was completed on 11/19. It should have been conducted after the fiscal year, but due to COVID it wasn't completed until November. The audit was conducted via zoom. It took a bit more time and coordination, but they got it completed! Everything was in order, but there are a couple recommendations. The committee didn't have time to look into insurance liability, but they are recommending that the next committee look in to this for the future just in case. There were also a few checks that hadn't cleared ("stale checks") – one to Iowa Student Loan for \$450 that hasn't been cashed, and also two memorials that were sent in June for \$25 to Sunken Gardens and another one for \$25 to Hearts United. As far as creating the 21-22 budget, they recommend to have budget requests sent by 2/26 so they can be reviewed by the March BOD meeting.

Mary's report on Training: A survey was sent to NeASFAA members to gauge their opinions on training. With COVID in mind, many organizations have deployed virtual training. NeASFAA membership was very open to virtual training opportunities. We have a platform in which we can deploy virtual training at low or no cost to the membership, and the taskforce feels that we should take advantage of that. Membership did note that we miss being together in person to talk and network. When we work together and bounce ideas off each other, we all improve. When we have future training opportunities, we should try to strike a balance between training and networking since both are critically important.

Another finding was that training topics matter. There will be a multitude of topics to train on over the next few years. During the past 3-4 years, not a lot was changing in financial aid, save from a few issues like SULA, etc. With the changes happening in Congress, there will be some new topics that people will need to be trained on. It will also be important to take advantage of training opportunities offered through our partner organizations like RMASFAA and NASFAA.

Discussion on whether our younger/newer members value in person vs virtual training. We think these members do still find value in the in person networking opportunities. Justin brought up that some of the newer members may not even realize the importance/value of in person training until they actually experience it. Sheila brought up again (we have discussed this previously) that we could provide a discount for first time attendees so they feel more inclined to attend. Discussion about providing a scholarship or fund that schools can apply for if they don't have funding to send staff members to a conference.

Erika had an idea about offering a discount to presenters. She also brought up having our corporate sponsors put up some funding for the 'scholarship.' Her other thought was about online training; we could offer short trainings on multiple days rather than long days of training with multiple sessions per day. Kim brought up that the P&P includes language about presenters needing to pay conference fees, so we would need to update that if we decided to change anything there.

Justin brought up an idea about potentially doing some kind of fund raising with the membership to see if institutional members would like to donate to the scholarship fund. Jodi brought up that during the virtual conference, it could be difficult to come up with an appropriate philanthropy recipient, so we could maybe do the scholarship donations as our philanthropy project for the upcoming conference. Ritchie mentioned that we have quite a bit of funding available in our reserves; we could potentially charge people less (\$50 per person rather than \$100 per person etc). Justin mentioned that people sometimes see more value if they pay \$50 and they also have a \$50 waiver/donation from outside party/scholarship etc.

NeASFAA Spring Conference 2021: The conference will be held via zoom. The cost is \$35 per institution, and \$50 for associate members. For Thursday, there will be 3 sessions in the morning, 3 in the afternoon, includes a social event. On Friday morning there are 3 sessions. Justin Draeger will be speaking in a Friday morning session. Association Business Meeting will be after that, then awards. Proposals are open for presenters. Budget variance not needed for zoom, teams, or whatever platform it ends up being, because PDRC was able to take it out of their own budget.

Robb mentioned corporate support sponsors; whether or not there will be enough opportunities for them to be involved with the conference. If we can't involve them very much, that's okay. Kim said they are going to ask the associate members if they want to moderate sessions.

Justin asked about philanthropy; Kim and Robb discussed in their last meeting that it would potentially be difficult to do philanthropy virtually. Justin proposed an idea to have the philanthropy project be for us to set up a scholarship fund for NeASFAA. We can just mention it once at the conference and have it set up so that people can begin donating if they like. We will need funding before we can open the account. Goal would be to start spending the funds next year at some point. Maybe during the next board meeting, Justin could create a task force to work on this. This fund would be an account specifically for members of NeASFAA, managed by the board. Awards could be granted to institutions who don't have enough funding to send members to conferences. Lisa mentioned that we might want to survey the membership first before we start this just to make sure it would be something the membership wants.

NASFAA Leadership Conference: Justin's item – In our P&P we have a budgeted line item for the President Elect-Elect to attend the NASFAA leadership conference. The conference will be virtual this year, so much less expensive than in the past. It's \$350 per person for the virtual expense. Lisa went last year because her school sent her, but she went on a different track other than the leadership track. Usually sending one person is \$1500-\$3000 because there is airfare, hotel, meals, and conference registration. Justin proposes that in addition to sending Kim, we should send Lisa, Erinn, and any of the Sector Representatives who are interested. Lisa said there is enough money for 5 people to attend in the budget currently. The conference is in February 2, 9, 16, 23, 25, and March 2. Most have 3 short sessions per day. Lisa, Erinn, Sheila P, Jodi, and Susan C are interested as well. This is 6 people, but we can go over on the budget just a little bit since Renee will not be exceeding her entire budget.

Since the P&P says we only can send one person, Justin makes a motion to send (in addition to Kim) Lisa, Erinn, Sheila P, Jodi, and Susan C to the NASFAA Leadership conference. This is an exception just for this year due to the low cost. Second by Lisa. Motion carries.

Corporate Development – Coffee Breaks and Corporate Support: Robb would like to start morning coffee breaks instead of the evening happy hours just to try something new. He was thinking we would start in February. Associate members who are standing members of NeASFAA would be eligible to host. We would do a random drawing to see who gets to host one.

Association Governance – Bylaw change and P&P Summer Institute Modification: Sheila has three items for this.

First item – We discovered the tax code listed was incorrect in the P&P and in the Bylaws. It was corrected in the P&P last spring, but Bylaws haven't been corrected yet. We need to change it from a

501(c)3 to a 501(c)6. Sheila makes a motion to approve a change in the Bylaws to correct the IRS tax code section in the Bylaws from a 501(c)3 to a 501(c)6. Justin seconds. Motion carries.

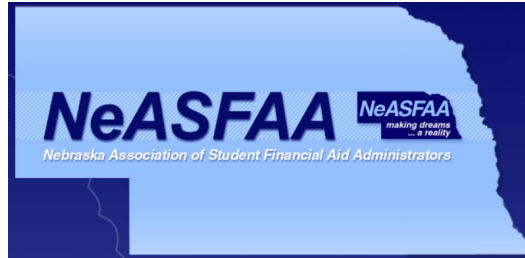
Second item – Updates to language surrounding SI scholarship. The board wanted to remove some of the language to be less specific so it is less prescriptive. Sheila makes a motion to update the policy revisions as presented in her report. Lisa seconds. Motion carries.

Third item – In the approved SI policy, it discusses having forms in the Dropbox. This isn't the only place in the manual where we mention Dropbox storage. Sheila would like to revise all references to Dropbox and update it to "NeASFAA's electronic storage location" so we're not tied to a specific platform for storage. Sheila makes a motion to update all mentions of Dropbox storage in the P&P to say "NeASFAA's electronic storage location" instead. Second by Justin. Motion carries. Discussion: Renee would like us to also update this in the timeline and include links to the exact location of the documents being referenced. Motion carries.

Road to Relevance Discussion: Lisa, Sarah, and Sheila P. discussed the chapters they read. Important highlights – Board continuity is difficult when we are constantly cycling through new Presidents each year. We could consider having the President-Elect, President, and Past President meeting regularly along with the Historian to ensure we are moving forward as a board each year and not jumping around to different priorities for each separate president as they begin their terms. Another important consideration; many of us on the board are friends, and it can sometimes be difficult to challenge ideas. Board members should put aside their personal feelings when making decisions to ensure we are serving the association to the best of our abilities. We can't be afraid to challenge ideas we may not agree with so we can have productive discussion and make the best decisions for the association we possibly can.

Adjournment: Motion to adjourn by Kim. Second by Justin. Meeting adjourned at 11:38am.

Next Board Meeting:
March 2021 - Zoom



Corporate Development Committee Report
NeASFAA Board of Directors Meeting
March 24, 2021

Committee Members: Robb Cummings (Sallie Mae) – Chair
Jeff Recker (Ascendium Education) – Vice Chair
Peggy Wilson (Southeast Community College) – Committee Member
Jodi Vanden Berge (EducationQuest Foundation) – Associate Sector Rep.

We started the NeASFAA Coffee Break calls in February, with Inceptia serving as host. Ascendium hosted the call earlier this month. Each call had 20-25 participants. It served as a nice 30-minute catch up time and several topics were discussed.

The remaining calls for the year, and hosts, are as follows:

April 21 – College Ave
May 19 – ELM
June 16 – Iowa Student Loan
July 21 – ScholarNet
August 18 – SoFi
September 15 – Citizens Bank
October 20 – Professional Choice Recovery
November 17 – Sallie Mae
December 15 – EducationQuest

Since the 2021 NeASFAA Conference will be held virtually, the PDRC and Corporate Development agreed not to offer sponsorship opportunities. In addition, the NeASFAA Philanthropy Project has been paused until we can again gather in person for a conference. We will continue to work with the Board and the PDRC to maximize Corporate Development opportunities in 2021 and forward.

No other issues to report.

Respectfully Submitted,

Robb Cummings

Annual Report: Membership Connections Committee

March 24, 2021 Board Meeting

This year the Membership Connections Committee was tasked with freshening up the website. We provided feedback on the new NeASFAA logo and worked with the website host (SOCS) to update the masthead. Many website updates were made including updating the Board of Directors page with the 2020-2021 Board, updated the Committee information pages, added the Awards granted at the Spring conference, updated the NeASFAA Forms, added the updated NeASFAA Policies and Procedures manual and Board and Committee Timeline, and added the approved Board Minutes from previous meetings. Membership directory updates were also completed when received.

Conference dates for 2021 and 2022 and information on the Fall Discussion Series were added to the website. We reached out to SOCS for list of who is on listserv. The committee brainstormed on what to do when members don't renew; how to keep membership, voting contacts, and billing contacts up to date; and how to make it easier for new members to have staff added to listserv. We assisted the Registration sub-committee of PDRC by working with SOCs to get the Spring Conference registration form built. The press release that NeASFAA sent out regarding expanded SNAP eligibility and the Emergency Broadband Benefit Program was posted on the website.

The President asked us to look into creating email addresses for the President and Treasurer to use for correspondence with outside entities and for historical knowledge transfer. We reached out to RMAFSA webmaster and other state organizations for ideas. The Historian and Secretary were also investigating new storage solutions to replace Dropbox. To meet both needs, Office 365 was implemented. The Chair participated in Office 365/Teams training and started using the Membership@NeASFAA.org email, worked with SOCs to have all the @NeASFAA.org email addresses added to listserv, added a notice on the Membership Directory page to direct members to contact Membership@NeASFAA.org for directory updates, and worked with the Historian and Secretary on setting up OneDrive to start the transition away from Dropbox.

Membership renewal emails were sent out in June. Reminders were sent out in late July and December for those that had not renewed. We worked with the Treasurer to update primary contacts, track renewals received, and troubleshoot incorrect payment amounts. At the request of the President, we compiled a list of institutions in the state that were not NeASFAA members. We then worked with the President to send out membership invitations to nine schools. Later, due to a change in personnel, the President asked that we reach out to UNMC to rejoin NeASFAA. We also followed up with members who hadn't renewed. For 20-21 NeASFAA had 19 Institutional members and 14 Associate members.

We identified that Membership Connections Committee has been working out of two Dropbox folders: Communications Committee and Membership Communications Committee. The Communications Committee folder was more up to date, so the information in the Membership Communications Committee folder was moved over to the Communications Committee folder to consolidate and avoid confusion going forward. The Vice-chair and Chair spent time training on website changes.

This year the Membership Connections committee assisted with many information requests. We ensured the Membership directory was up to date so that sector reps could reach out to set up COVID

related sector meetings. We provided a list of members to the Training Task Force Chair for their training needs survey. To help with ballot tabulation, we provided a list of primary contacts and email addresses to the President-elect to follow up on ballots not received. We also provided a list of paid members for 20-21 to the President to forecast membership for 21-22.

As incoming Secretary, I was able to participate in the NASFAA Leadership and Legislative conference – Association Leadership track. Thank you to the Board for the great learning and networking opportunity. In early March, the Chair and Vice-Chair met on transition and to discuss the budget for the Membership Committee for next year.

Respectfully submitted by Erinn M. Brown, Membership Connections Chair

Membership Connections Report

March 24, 2021 Board Meeting

It's been a busy few months! I was able to participate in the NASFAA Leadership and Legislative conference – Association Leadership track. Thank you to the Board for the great learning and networking opportunity. I participated in Office 365/Teams training and started using the Membership@NeASFAA.org email. I worked with SOCs to have all the @NeASFAA.org email addresses added to listserv. We also added to a notice on the Membership Directory page to direct members to contact Membership@NeASFAA.org for directory updates. I worked with Ritchie and Sarah on setting up OneDrive to start the transition away from Dropbox.

I worked with the Registration sub-committee of PDRC and SOCs to get the Spring Conference registration form built. The updated P&P and Board and Committee Timeline were posted to the website. The press release that NeASFAA sent out regarding expanded SNAP eligibility and the Emergency Broadband Benefit Program was posted on the website. The committee worked on Membership Directory updates. Erika and I met on transition and to discuss the budget for the Membership Committee for next year.

We received membership requests from Credible and Earnest Student Loans. Credible was approved when the Board met in early March. Earnest's request is on the March agenda. I also provided a list of paid members for 20-21 to Renee.

Respectfully submitted by Erinn M. Brown, Membership Connections Chair

NeASFAA Board Meeting
Past-President's Report
March 24, 2021

- I continue to be involved as chair of the registration committee for RMASFAA's 2021 conference.
- I assisted Susan Frodyma with compiling NeASFAA's 2021-2022 budget forms and met with the Finance and Audit committee to review the proposed budget.

Respectfully submitted,

Sheila Johns

March 26, 2021
NeASFAA Spring Conference
PDRC Annual Report

With COVID 19 restrictions, the PDRC had to make some adjustments to the normal training practices. We had to move to a virtual format for our fall and spring trainings. Here is a recap the year:

- Fall Training Series
 - Your Office and the Current Climate – had 65 attendees
 - COVID - 19 and Professional Judgement – had 64 attendees
 - What's in Your Tool kit – had 50 attendees
- In December the board made the decision to move the 2021 NeASFAA Spring conference to a virtual format. Divots cancelled are in person conference with no fees. We will return to Divots in 2022.
- In January we presented bids form Younes Convention Center in Kearney, Ramada North Platte-Sandhills Convention Center and Ramada Inn in Grand Island for our 2023 conference. We did request a bid from Hampton Inn and Suites in Scottsbluff twice, but a formal bid was never received. After reviewing the bids, the committee is recommending the Ramada Inn in Grand Island for the site of our 2023 conference. The board approved our recommendation.
- March 24-26, 2021 Spring conference virtual. 32 institution/associate member organizations are currently registered with attendance projected to be over 125 attendees. We are excited to have over 25 first time attendees joining us this year. The conference has over nine sessions along with a social event and business meeting.

Committee members included Matt Johnson (Vice Chair), Richelle Saalfeld (co-co-chair), Kristie Artz, Wendy Matulka, Wendy Cobb, James Lapointe, Jordan Eisenmenger, Tom Ochsner, Carlos Garcia & Justin Brown

A special thank you to Richelle Saalfeld and Matt Johnson. In August the current co-chair left. Richelle, co-co-chair, stepped in to help with requesting the site bids for 2023. Requesting bids in the summer and fall was difficult because of many offices were closed due to COVID 19. Matt joined the committee mid-year to take over as co-chair and helped Richelle finish up the 2023 board proposal. They are both a great asset to NeASFAA.

Respectfully Submitted,

Kimberly Vanosdall

NeASFAA Board Meeting
October 23, 2020
PDRC Report

Our committee met via zoom on January 13th, February 10th, and March 10th.

The 2021 Virtual Nebraska conference will be held March 25 and 26. Zoom was purchased to provide the conference. The conference will have nine sessions. There will be a social hour on Thursday afternoon where members can test their trivia skills. We will end the conference with the annual business meeting and awards on Friday afternoon. Registration opened on February 16. There are currently 32 institutions/associate organizations registered. Award nominations as well as retirees, babies and grandbabies were requested in February and March.

Kimberly Vanosdall
PDRC Chair

NeASFAA March 2021 Board Meeting President's Report

Submitted: Renee L. Besse

Date: March 24, 2021

Time to write my final Board report as President of NeASFAA. Surprisingly, in a year with so many disruptions and changes, my term serving as president has flown by.

Just a few highlights since our January meeting:

1. We have welcomed a new associate member to the association on March 4th. Credible will be joining us for our 20-21 virtual Spring Conference.
2. I sent out a press release on behalf of NeASFAA sharing information about the expanded SNAP and Broadband opportunities for college students in Nebraska. Thanks to EducationQuest for sharing the press contacts.
3. Working with Justin Brown and the Audit and Finance Committee to visit our investment strategy.
4. Worked with SFRC to send communications to State Representatives supporting LB62 in the Nebraska Legislature based on survey from membership.
5. On February 24th Laura Thayer-Mencke stepped back from Chair of the Audit and Finance Committee. Thankfully, Susan Frodyma quickly stepped up to fill the remaining duties of the chair – which was no small task – getting the 21-22 NeASFAA Budget constructed for this meeting. Many, many thanks to Susan and to Sheila Johns for helping guide Susan through the steps.
6. Signed a letter of support, on behalf of NeASFAA, to send to members of Congress supporting doubling the maximum Pell Grant.
7. Signed Contract for Spring 2023 Conference at Ramada in Grand Island

It has been my honor to serve with you on the 2020-21 NeASFSAA Board of Directors and I look forward to serving with most of you under Justin's leadership next year!

Renee

2020-2021 BOARD OF DIRECTORS

March 23, 2021

President

Renee Besse
University of Nebraska-Kearney

President-Elect

Justin Chase Brown
University of Nebraska-Lincoln

Past-President

Sheila Johns
Western Nebraska Community College

Secretary

Sarah Standley
University of Nebraska-Lincoln

Treasurer

Lisa Gdowski
Central Community College

2-Year Public Sector

Kimberly Vanosdall
Northeast Community College

Associate Sector

Jodi Vanden Berge
EducationQuest Foundation

4-Year Public Sector

Sheila Pourier
Chadron State College

Private Sector

Susan Collins
Capitol School of Hairstyling and Esthetics

Historian

Ritchie Morrow
Coordinating Commission for Postsecondary Education

Your Nebraska financial aid professionals: Advocating for students and facilitating dialogue for how best to distribute financial resources for students pursuing higher education in the State of Nebraska.

Dear Board of Directors,

I am excited to write this final report as President-Elect before transitioning to President. I have been engaged in the following activities since our last meeting:

- The Nominations and Elections committee selected Andrew Landrum, Financial Support Counselor at the University of Nebraska-Omaha, for the 2021 NeASFAA Scholarship to attend RNASFAA Summer Institute for intermediate/advanced.
- As a reminder, the Nominations and Elections committee will begin accepting applications for the beginner scholarship, which is due April 15. We need to recruit together as a board and aim for applicants from each sector. This is your call to action as a board to recruit and remind colleagues of this opportunity.
- I had a conversation with several board members and NeASFAA members about 2021-22 membership dues, which is incorporated into the budget, suggesting we reduce the cost for our smallest institutional members and increase dues for our largest institutional members due to the global pandemic's inequitable impact on our Nebraska institutions.
- I discussed with our new Audit and Finance Chair, current President, Treasurer, and several other folks about NeASFAA's investment strategy. We have CD's coming due this year and our investment income is very small. We will be meeting with NASFAA's investment managers to inquire about options and state our goals.
- As I transition to President, I have some ambitious goals and I haven't had a chance to reach out to all new committee chairs yet, but plan to shortly after the conference to discuss goals and objectives for the coming year. Overall, I plan to institute three task forces to address three main priorities:
 - **Priority 1:** Safely return to in-person activities this year.
 - **Priority 2:** Continue implementation and business rules for the administrative functions of NeASFAA.
 - **Priority 3:** Share information and knowledge on FAFSA Simplification Updates, ED implementation, and best practices.
- Three task forces will be created to address these priorities led by Paula Kohles, Sarah Standley, and Becca Dobry.
- I would like the 2021-2022 voting members for the Board of Directors to stay on after the business meeting on Friday so we can ratify the election results. If you have other suggested agenda items, please email them to me.
- Please mark your calendars on April 9th from 9 a.m. to 11 a.m. for a NeASFAA President's Orientation. That will serve as the culmination of our transition from the 2020-2021 board to the 2021-2022 board before our first full board meeting in May. Between now and then, incoming and outgoing committee chairs and elected positions should coordinate to discuss their roles and share any necessary information and be prepared to discuss on April 9th!

Thank you! Respectfully Submitted,
Justin Brown



Secretary Report

NeASFAA Board of Directors Meeting

March, 2021

Sarah Standley

I assisted Ritchie and Erinn with testing and implementation of Microsoft Business Basic. I also moved all Dropbox documents to SharePoint so we can do further testing to see if this will be the appropriate location for our NeASFAA documents moving forward.

I took minutes at the January BOD meeting as well as the Special BOD Meeting on March 4th where we discussed membership for Credible.

Respectfully submitted,

Sarah Standley

State & Federal Relations Committee Report
Board of Directors Meeting
March 2021

The committee sent a letter to Sen Lynne Walz from Fremont who was elected the new chair of the Legislature's Education Committee.

We also monitored a number of bills which were introduced in the Legislature. Specifically, LB62 and LB529 were bills that were introduced which addresses how to disburse lottery funds over the next five years. LB529 is the preferred bill of the Education Committee as it has received priority status. NeASFAA submitted letters regarding both of these bills.

LB200 was a bill introduced which would require high school seniors at public high schools to submit the FAFSA prior to high school graduation. A survey of the membership received mixed results on the support of this bill, so the Board took no position.

Respectfully submitted,
J. Ritchie Morrow, Chair

State and Federal Relations Committee (SFRC)
Year-end Report
March 2021

This committee is charged with monitoring federal and state legislation and submitting letters or testimony based on positions determined by the Board. Due to Covid-19 protocols this year the Nebraska Legislature requested limited in-person testimony, so all of NeASFAA's positions were submitted as written testimony.

The committee submitted a letter of congratulations to Sen Lynne Walz who was elected Chair of the Education Committee, and letter on LBs529 and 62 which both addressed how to disburse lottery funds over the next five years. We also submitted a letter to our Congressional representatives encouraging them to support additional funding to postsecondary institutions to help cover financial losses due to Covid.

Members of the committee this year were:

J. Ritchie Morrow, Chair, CCPE
Diana Oglesby, Vice Chair, SCC
Stacy Dieckman, NECC
Paula Kohles, UNMC
Vicki Kucera, CCC
Beth Sisk, CSM
Doug Watson, Midland
Renee Besse, ex-officio, UNK
Justin Chase Brown, ex-officio UNL
Jackie Cottom, ex-officio, NASFAA

NeASFAA Board of Directors Meeting
Thursday March 4, 2021
Conducted via Zoom

Attendance:

Present: Renee Besse, Justin Brown, Lisa Gdowski, Sarah Standley, Sheila Pourier, Kimberly Vanosdall, Susan Collins, Jodi Vanden Berge

Committee Chairs/Members also in attendance: Ritchie Morrow, Erika Kampschneider, Susan Frodyma, Diana Oglesby, Matt Johnson

Not Present: Sheila Johns

Call to order: Renee called the meeting to order at 2:02pm.

Business on the Table:

Request for Membership from Credible: They're members of NASFAA, RMASFAA and a bunch of state associations. They help students compare different private lender options. Motion to approve Credible as a NeASFAA member by Justin. Second by Susan P. The person is Dennis, and he has been to RMASFAA conferences before. Motion carries.

Adjournment: Meeting adjourned at 2:29pm.

Next Board Meeting:

March 2021 - Zoom

Treasurer's Report
March 22, 2021

Account Balances

Account	Bank	Length	Rate	Maturity Date	Value
Checking	US Bank				\$43,618.92
CD 3-057-9044-4270	US Bank	9 months	.05%	4/3/2021	\$20,389.27
CD 576620	Union Bank	18 months	2.35%	10/5/2021	\$15,278.38
CD 580134	Union Bank	17 months	1.95%	07/10/2021	\$29,318.03
CD 586665	Union Bank	16 months	.80%	11/08/2021	\$31,900.79
					\$140,505.39

1. Statement of Financial Position
2. Budget vs Actual
3. Association 2020 IRS Form 990-N filed November 11, 2020
4. Audit Completed November 19, 2020 via Zoom
5. 2021-2022 Nonprofit Corporation Biennial Report filed March 5, 2021.

Respectfully submitted,
Lisa Gdowski

Nebraska Association of Student Financial Aid Administrators

Statement of Financial Position

As of March 22, 2021

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	
Checking	43,618.92
Total Bank Accounts	\$43,618.92
Other Current Assets	
CD 3-057-9044-4270 US BANK 4/3/21	20,109.06
CD 576620 Union Bank 10/5/21	15,133.52
CD 580134 Union Bank 7/10/21	28,883.06
CD 586665 Union Bank 11/8/21	30,624.20
Total Other Current Assets	\$94,749.84
Total Current Assets	\$138,368.76
TOTAL ASSETS	\$138,368.76
LIABILITIES AND EQUITY	
Total Liabilities	
Equity	
Opening Balance Equity	131,935.88
Retained Earnings	7,472.18
Net Revenue	-1,039.30
Total Equity	\$138,368.76
TOTAL LIABILITIES AND EQUITY	\$138,368.76

2020-21 NeASFAA BUDGET

3/22/2021

INCOME	BUDGET	ACTUAL
Membership Income-Institutional	\$ 6,925.00	\$ 7,175.00
Membership Income-Associate	\$ 2,200.00	\$ 2,600.00
Interest Income	\$ 12.00	\$ 2.81
Late Fees		\$ 200.00
Reserve (to balance)	\$ 10,311.00	
Spring Conference	\$ 10,050.00	\$ 990.00
Credentialing Sessions	\$ 1,900.00	
Fall Workshop	\$ -	
Total Income	\$ 31,398.00	\$ 10,967.81

Notes:	
Membership 2020-21 Actual	
Associate	\$ 2,200.00
Institutional	\$ 6,925.00
	<u>\$ 9,125.00</u>
1-999	\$ 1,750.00
1000-4999	\$ 3,000.00
5000-9999	\$ 1,300.00
10000-19999	\$ 400.00
20000+	\$ 475.00

EXPENSES

Membership		
Welcome Project	\$ 100.00	
Printing/Postage	\$ 25.00	
Budget Variance Website Logo Update	\$ 350.00	
Total Membership	\$ 475.00	\$ -

PDRC

Meeting Expense	\$ 400.00	
Credentialing	\$ 1,900.00	
Spring Conference		
Entertainment	\$ 500.00	
Meals/breaks	\$ 9,500.00	
Printing/Postage	\$ 250.00	
Speaker Expense	\$ 4,050.00	
AV Equipment	\$ 100.00	
Credentialing Material	\$ -	
Prestigious Awards	\$ 550.00	
Total Spring Conference	\$ 14,950.00	\$ -
Fall Training		
Meals/breaks	\$ -	
Printing/Postage	\$ -	
Credentialing Material	\$ -	
Speaker Expense	\$ -	
Facility Expense	\$ -	
Total Fall Training	\$ -	
Total PDRC	\$ 17,250.00	\$ -

President/President Elect

Board Meetings	\$ 500.00	
Transitional Board Meeting	\$ 200.00	
Leadership Conference	\$ 2,500.00	\$ 2,085.00
NASFAA Conference	\$ 2,150.00	
RNASFAA Conference	\$ 1,500.00	
RNASFAA State Gift (Past-President)	\$ 75.00	
Budget Variance - EducationQuest Virtual		
College Fair	\$ 500.00	\$ 500.00
Budget Variance - Membership Leap - NeASFAA		
Logo	\$ 600.00	\$ 500.00
Summer Institute Scholarship	\$ 750.00	\$ 650.00
Budget variance-SI Scholarship	\$ 1,500.00	

Goal Setting Speaker	\$	600.00		
Road to Relavance Book	\$	100.00		
QuickBooks Online	\$	420.00	\$	217.50
Budget Variance-Quickbooks Plus	\$	420.00		
Quickbooks books & consulting	\$	780.00		
Adhoc Committee - "What Does Training Look Like for NeASFAA 2020 and Beyond"	\$	100.00		
Total President/President Elect	\$	12,695.00	\$	3,952.50
Secretary				
Cards/Memorials/Flowers	\$	75.00		
Budget Variance - Microsoft Business Basic	\$	300.00	\$	28.50
Total Secretary	\$	375.00	\$	28.50
Treasurer				
Association Liability Policy	\$	500.00		
Banking Expense	\$	-		
Biannual Non-Profit Filing	\$	23.00	\$	23.00
Change of Agent Fee	\$	10.00	\$	10.00
Computer Expense	\$	-		
Tax Preparation	\$	50.00	\$	50.00
Treasurer Other	\$	-	\$	-
Budget Variance-postage	\$	20.00	\$	21.90
Total Treasurer	\$	603.00	\$	104.90
Total Expenses		\$ 31,398.00		\$ 4,085.90

Treasurer's Report
March 22, 2021

Account Balances

Account	Bank	Length	Rate	Maturity Date	Value
Checking	US Bank				\$43,618.92
CD 3-057-9044-4270	US Bank	9 months	.05%	4/3/2021	\$20,389.27
CD 576620	Union Bank	18 months	2.35%	10/5/2021	\$15,278.38
CD 580134	Union Bank	17 months	1.95%	07/10/2021	\$29,318.03
CD 586665	Union Bank	16 months	.80%	11/08/2021	\$31,900.79
					\$140,505.39

The Association's 2021-2022 Nonprofit Corporation Biennial Report was filed 3/5/2021.

I have submitted the following reports:

1. Statement of Financial Position
2. Statement of Activity
3. Transaction Report
4. Budget vs Actual

Respectfully submitted,
Lisa Gdowski

Nebraska Association of Student Financial Aid Administrators

Statement of Financial Position

As of March 22, 2021

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	
Checking	43,618.92
Total Bank Accounts	\$43,618.92
Other Current Assets	
CD 3-057-9044-4270 US BANK 4/3/21	20,109.06
CD 576620 Union Bank 10/5/21	15,133.52
CD 580134 Union Bank 7/10/21	28,883.06
CD 586665 Union Bank 11/8/21	30,624.20
Total Other Current Assets	\$94,749.84
Total Current Assets	\$138,368.76
TOTAL ASSETS	\$138,368.76
LIABILITIES AND EQUITY	
Total Liabilities	
Equity	
Opening Balance Equity	131,935.88
Retained Earnings	7,472.18
Net Revenue	-1,039.30
Total Equity	\$138,368.76
TOTAL LIABILITIES AND EQUITY	\$138,368.76

Nebraska Association of Student Financial Aid Administrators

Statement of Activity

July 1, 2020 - March 22, 2021

	TOTAL
Revenue	
Sales	10,615.00
Uncategorized Income	2.81
Total Revenue	\$10,617.81
GROSS PROFIT	\$10,617.81
Expenditures	
Advertising & Marketing	500.00
Legal & Professional Services	510.00
Office Supplies & Software	246.00
Other Business Expenses	21.90
Taxes & Licenses	73.00
Travel	2,735.00
Total Expenditures	\$4,085.90
NET OPERATING REVENUE	\$6,531.91
NET REVENUE	\$6,531.91

Nebraska Association of Student Financial Aid Administrators

Transaction Detail by Account
January 14 - March 22, 2021

DATE	TRANSACTION TYPE	NUM	NAME	MEMO/DESCRIPTION	SPLIT	AMOUNT	BALANCE
Checking							
01/21/2021	Expenditure	3151	Lisa Gdowski	Reimbursement for Lisa to attend the 2021 NASFAA Symposium as Treasurer.	Travel	-350.00	-350.00
01/21/2021	Expenditure	3149	Erinn Brown	Reimbursement for Erinn to attend the 2021 NASFAA Leadership Symposium as Secretary Elect.	Travel	-350.00	-700.00
01/21/2021	Expenditure	3150	Kimberly Vanosdall	Reimbursement for Kim to attend the 2021 NASFAA Symposium as President Elect.	Travel	-350.00	-1,050.00
01/29/2021	Deposit	INTEREST		Interest Earned	Uncategorized Income	0.37	-1,049.63
01/29/2021	Receipt	1041	Stale check		Sales	50.00	-999.63
02/04/2021	Expenditure	3152	Sheila Pourier	Reimbursement for Sheila to attend the NASFAA Leadership Symposium as Sector Rep.	Travel	-350.00	-1,349.63
02/12/2021	Expenditure	1000185569198	Intuit Quickbooks	February 2021 Quickbooks online	Office Supplies & Software	-40.00	-1,389.63
02/26/2021	Deposit	INTEREST		Interest Earned	Uncategorized Income	0.33	-1,389.30
03/01/2021	Receipt	1052	Central Community College		Sales	35.00	-1,354.30
03/01/2021	Receipt	1047	Sallie Mae		Sales	50.00	-1,304.30
03/01/2021	Receipt	1049	Inceptia		Sales	50.00	-1,254.30
03/01/2021	Receipt	1051	Concordia University		Sales	35.00	-1,219.30
03/01/2021	Receipt	1048	University of Nebraska - Omaha		Sales	35.00	-1,184.30
03/01/2021	Receipt	1044	Nebraska Indian Community College		Sales	35.00	-1,149.30
03/01/2021	Receipt	1045	Southeast Community College		Sales	35.00	-1,114.30
03/01/2021	Receipt	1046	Ascendium Education Solutions		Sales	50.00	-1,064.30
03/01/2021	Receipt	1043	ELM Resources		Sales	200.00	-864.30
03/03/2021	Receipt	1050	Wayne State College		Sales	35.00	-829.30
03/05/2021	Receipt	1042	University of Nebraska Medical Center		Sales	250.00	-579.30
03/05/2021	Expenditure	60989502	Robert B. Evnen, Secretary of State	2021-2022 Nonprofit Corporation Biennial Report	Taxes & Licenses	-23.00	-602.30
03/05/2021	Receipt	1053	Professional Choice Recovery		Sales	50.00	-552.30
03/05/2021	Expenditure		Intuit Quickbooks	Proration charge to go from Quickbooks Online Essentials to Quickbooks Online Plus	Office Supplies & Software	-7.50	-559.80
03/08/2021	Receipt	1058	Iowa Student Loan		Sales	50.00	-509.80
03/08/2021	Receipt	1057	SoFi		Sales	50.00	-459.80
03/08/2021	Receipt	1056	Xenon Academy		Sales	35.00	-424.80
03/08/2021	Receipt	1055	Chadron State College		Sales	35.00	-389.80
03/08/2021	Receipt	1054	Western Nebraska Community College		Sales	35.00	-354.80
03/08/2021	Receipt	1059	Coordinating Commission for Post Secondary Education		Sales	50.00	-304.80
03/11/2021	Receipt	1063	Mid-Plains Community College		Sales	35.00	-269.80
03/11/2021	Receipt	1061	University of Nebraska Medical Center		Sales	35.00	-234.80
03/11/2021	Receipt	1062	University of Nebraska - Lincoln		Sales	35.00	-199.80
03/11/2021	Receipt	1060	Doane University		Sales	35.00	-164.80
03/12/2021	Expenditure	3153	Chantel Merchen	2020 RMASFAA Summer Institute Scholarship redeemed in 2021.	Travel	-650.00	-814.80
03/12/2021	Expenditure		Intuit Quickbooks		Office Supplies & Software	-70.00	-884.80
03/15/2021	Receipt	1066	ScholarNet		Sales	50.00	-834.80
03/15/2021	Receipt	1065	EducationQuest Foundation		Sales	50.00	-784.80
03/15/2021	Receipt	1064	Northeast Community College		Sales	50.00	-734.80
03/15/2021	Receipt	1067	Credible Operations Inc.		-Split-	250.00	-484.80
03/19/2021	Receipt	1068	University of Nebraska - Kearney		Sales	35.00	-449.80
03/19/2021	Expenditure	3154	Breakpoint Technology, LLC	Expenditure from 12/14/2020 through June 2021	Office Supplies & Software	-28.50	-478.30
Total for Checking							\$ -478.30
Sales							
01/29/2021	Receipt	1041	Stale check	Adding stale checks #3138 & #3139	Checking	50.00	50.00
03/01/2021	Receipt	1044	Nebraska Indian Community College		Checking	35.00	85.00
03/01/2021	Receipt	1052	Central Community College		Checking	35.00	120.00
03/01/2021	Receipt	1045	Southeast Community College		Checking	35.00	155.00
03/01/2021	Receipt	1046	Ascendium Education Solutions		Checking	50.00	205.00
03/01/2021	Receipt	1048	University of Nebraska - Omaha		Checking	35.00	240.00
03/01/2021	Receipt	1049	Inceptia		Checking	50.00	290.00
03/01/2021	Receipt	1051	Concordia University		Checking	35.00	325.00
03/01/2021	Receipt	1047	Sallie Mae		Checking	50.00	375.00
03/01/2021	Receipt	1043	ELM Resources	20-21 Membership	Checking	200.00	575.00
03/03/2021	Receipt	1050	Wayne State College		Checking	35.00	610.00
03/05/2021	Receipt	1053	Professional Choice Recovery		Checking	50.00	660.00
03/05/2021	Receipt	1042	University of Nebraska Medical Center		Checking	250.00	910.00
03/08/2021	Receipt	1057	SoFi	2021 Spring Conference	Checking	50.00	960.00
03/08/2021	Receipt	1056	Xenon Academy	2021 Spring Conference	Checking	35.00	995.00
03/08/2021	Receipt	1059	Coordinating Commission for Post Secondary Education	2021 Spring Conference Registration	Checking	50.00	1,045.00
03/08/2021	Receipt	1058	Iowa Student Loan	2021 Spring Conference Registration	Checking	50.00	1,095.00
03/08/2021	Receipt	1054	Western Nebraska Community College	2021 Spring Conference Registration	Checking	35.00	1,130.00
03/08/2021	Receipt	1055	Chadron State College	2021 Spring Conference Registration	Checking	35.00	1,165.00
03/11/2021	Receipt	1061	University of Nebraska Medical Center	2021 Spring Conference Registration	Checking	35.00	1,200.00
03/11/2021	Receipt	1063	Mid-Plains Community College	2021 Spring Conference Registration	Checking	35.00	1,235.00
03/11/2021	Receipt	1062	University of Nebraska - Lincoln	2021 Spring Conference Registration	Checking	35.00	1,270.00
03/11/2021	Receipt	1060	Doane University	2021 Spring Conference Registration	Checking	35.00	1,305.00
03/15/2021	Receipt	1066	ScholarNet	2021 Spring Conference Registration	Checking	50.00	1,355.00

Nebraska Association of Student Financial Aid Administrators

Transaction Detail by Account

January 14 - March 22, 2021

DATE	TRANSACTION TYPE	NUM	NAME	MEMO/DESCRIPTION	SPLIT	AMOUNT	BALANCE
03/15/2021	Receipt	1067	Credible Operations Inc.	2021 Spring Conference Registration	Checking	50.00	1,405.00
03/15/2021	Receipt	1067	Credible Operations Inc.	20-21 Associate Member Dues	Checking	200.00	1,605.00
03/15/2021	Receipt	1064	Northeast Community College	2021 Spring Conference Registration	Checking	50.00	1,655.00
03/15/2021	Receipt	1065	EducationQuest Foundation	2021 Spring Conference Registration	Checking	50.00	1,705.00
03/19/2021	Receipt	1068	University of Nebraska - Kearney	2021 Spring Conference Registration	Checking	35.00	1,740.00
Total for Sales						\$1,740.00	
Uncategorized Income							
01/29/2021	Deposit	INTEREST			Checking	0.37	0.37
02/26/2021	Deposit	INTEREST			Checking	0.33	0.70
Total for Uncategorized Income						\$0.70	
Office Supplies & Software							
02/12/2021	Expenditure	1000185569198	Intuit Quickbooks	February Quickbooks Online	Checking	40.00	40.00
03/05/2021	Expenditure		Intuit Quickbooks	February Quickbooks Online Plus	Checking	7.50	47.50
03/12/2021	Expenditure		Intuit Quickbooks	March Quickbooks Online Plus	Checking	70.00	117.50
03/19/2021	Expenditure	3154	Breakpoint Technology, LLC	Microsoft 365 Business Basic	Checking	28.50	146.00
Total for Office Supplies & Software						\$146.00	
Taxes & Licenses							
03/05/2021	Expenditure	60989502	Robert B. Evnen, Secretary of State	2021-2022 Nonprofit Corporation Biennial Report	Checking	23.00	23.00
Total for Taxes & Licenses						\$23.00	
Travel							
01/21/2021	Expenditure	3150	Kimberly Vanosdall	2021 NASFAA Leadership Symposium	Checking	350.00	350.00
01/21/2021	Expenditure	3151	Lisa Gdowski	2021 NASFAA Leadership Symposium	Checking	350.00	700.00
01/21/2021	Expenditure	3149	Erinn Brown	2021 NASFAA Leadership Symposium	Checking	350.00	1,050.00
02/04/2021	Expenditure	3152	Sheila Pourier	2021 NASFAA Leadership Symposium	Checking	350.00	1,400.00
03/12/2021	Expenditure	3153	Chantel Merchen	2021 RNASFAA Summer Institute Scholarship	Checking	650.00	2,050.00
Total for Travel						\$2,050.00	

2020-21 NeASFAA BUDGET

3/22/2021

INCOME	BUDGET	ACTUAL
Membership Income-Institutional	\$ 6,925.00	\$ 7,175.00
Membership Income-Associate	\$ 2,200.00	\$ 2,600.00
Interest Income	\$ 12.00	\$ 2.81
Late Fees		\$ 200.00
Reserve (to balance)	\$ 10,311.00	
Spring Conference	\$ 10,050.00	\$ 990.00
Credentialing Sessions	\$ 1,900.00	
Fall Workshop	\$ -	
Total Income	\$ 31,398.00	\$ 10,967.81

Notes:	
Membership 2020-21 Actual	
Associate	\$ 2,200.00
Institutional	\$ 6,925.00
	<u>\$ 9,125.00</u>
1-999	\$ 1,750.00
1000-4999	\$ 3,000.00
5000-9999	\$ 1,300.00
10000-19999	\$ 400.00
20000+	\$ 475.00

EXPENSES

Membership		
Welcome Project	\$ 100.00	
Printing/Postage	\$ 25.00	
Budget Variance Website Logo Update	\$ 350.00	
Total Membership	\$ 475.00	\$ -

PDRC

Meeting Expense	\$ 400.00	
Credentialing	\$ 1,900.00	
Spring Conference		
Entertainment	\$ 500.00	
Meals/breaks	\$ 9,500.00	
Printing/Postage	\$ 250.00	
Speaker Expense	\$ 4,050.00	
AV Equipment	\$ 100.00	
Credentialing Material	\$ -	
Prestigious Awards	\$ 550.00	
Total Spring Conference	\$ 14,950.00	\$ -
Fall Training		
Meals/breaks	\$ -	
Printing/Postage	\$ -	
Credentialing Material	\$ -	
Speaker Expense	\$ -	
Facility Expense	\$ -	
Total Fall Training	\$ -	
Total PDRC	\$ 17,250.00	\$ -

President/President Elect

Board Meetings	\$ 500.00	
Transitional Board Meeting	\$ 200.00	
Leadership Conference	\$ 2,500.00	\$ 2,085.00
NASFAA Conference	\$ 2,150.00	
RNASFAA Conference	\$ 1,500.00	
RNASFAA State Gift (Past-President)	\$ 75.00	
Budget Variance - EducationQuest Virtual		
College Fair	\$ 500.00	\$ 500.00
Budget Variance - Membership Leap - NeASFAA		
Logo	\$ 600.00	\$ 500.00
Summer Institute Scholarship	\$ 750.00	\$ 650.00
Budget variance-SI Scholarship	\$ 1,500.00	

Goal Setting Speaker	\$	600.00		
Road to Relavance Book	\$	100.00		
QuickBooks Online	\$	420.00	\$	217.50
Budget Variance-Quickbooks Plus	\$	420.00		
Quickbooks books & consulting	\$	780.00		
Adhoc Committee - "What Does Training Look Like for NeASFAA 2020 and Beyond"	\$	100.00		
Total President/President Elect	\$	12,695.00	\$	3,952.50
Secretary				
Cards/Memorials/Flowers	\$	75.00		
Budget Variance - Microsoft Business Basic	\$	300.00	\$	28.50
Total Secretary	\$	375.00	\$	28.50
Treasurer				
Association Liability Policy	\$	500.00		
Banking Expense	\$	-		
Biannual Non-Profit Filing	\$	23.00	\$	23.00
Change of Agent Fee	\$	10.00	\$	10.00
Computer Expense	\$	-		
Tax Preparation	\$	50.00	\$	50.00
Treasurer Other	\$	-	\$	-
Budget Variance-postage	\$	20.00	\$	21.90
Total Treasurer	\$	603.00	\$	104.90
Total Expenses	\$	31,398.00	\$	4,085.90