

NEASFAA

Nebraska Association of Student Financial Aid Administrators

Agenda: 2021 Annual Business Meeting

March 26th, 2021 1:30pm

Zoom Link:

NeASFAA's Strategic Direction:

**Promote
Professionalism**

**Train and
Develop**

**Coordinate
and Network**

**Influence
Legislation**

2021 NeASFAA Board

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	Laura Thayer-Menke
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 1:30pm

Agenda Topic	Objective	Discussant
1. Approval of the Agenda	Decide: Entertain a motion/discuss/vote.	Renee B.
2. Approval of March 2020 Minutes	Decide: Entertain a motion/discuss/vote.	Renee B.
3. Board and Committee Highlights	Discuss	Leadership
President		Renee
President Elect		Justin
Past President		Sheila
Treasurer		Lisa
Secretary		Sarah
Two Year Public Sector		Kim
Private Sector		Susan
Four Year Public Sector		Sheila
Associate Sector		Jodi
Corporate Development		Robb
Finance and Audit		Susan
Membership Connections		Erinn
PDR		Kim
SFRC		Ritchie
Training 2020 and Beyond		Mary

NEASFAA

Nebraska Association of Student Financial Aid Administrators

Agenda: 2021 Annual Business Meeting

March 26th, 2021 1:30pm

Zoom Link:

New Business

- | | | | |
|----|--|-----------------------------|--------------|
| 4. | 21-22 Budget Approval | Discuss | Renee/Susan |
| 5. | Bylaws Change 501(c)(3) to 501(c)(6) | Motion/Discussion/Vote | Sheila J |
| 6. | Election Results – Incoming Board. Goals for 20-21 | Discuss | Justin |
| 7. | Awards | | |
| | *Summer Institute Winner | | Justin |
| | * Rookie of the Year | | Renee |
| | * Bob Minturn Award | | Renee |
| | * Distinguished Service Award | | Renee |
| | * Retirees | | Renee |
| | * Years of Service, Babies... | | Wendy |
| | Adjournment | Decide: Entertain a motion. | Renee |

-Solving: Define, Discuss, Evaluate, Decide

NeASFAA Association Business Meeting
Friday March 26, 2021
Conducted via Zoom

Attendance:

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

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

Not Present: Sheila Pourier, Robb Cummings, Ritchie Morrow

Call to order: Renee called the meeting to order at 1:30 p.m.

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

Approval of March 2020 Minutes: Motion to approve by Justin, second by Sheila J. Motion carries.

Board and Committee Highlights:

President: Written report. Never thought she would be president during a global pandemic. Thank you for the opportunity!

President Elect: Written report. A lot of P&P updates. Appreciates all the volunteers. We got a new logo. Will be serving as RNASFAA Vice President Elect this year as well.

Past President: Written report. Served as outgoing state delegate for RNASFA. It's been an honor to serve!

Treasurer: Written report. Association is doing very well financially. We're going to be working on reinvesting some funds for the upcoming year. Tax return was filed in November, Audit was also completed in November.

Secretary: Written report. Sarah took minutes at all the BoD meetings and uploaded them to Dropbox. We ran out of room in Dropbox, so have been researching other storage solutions. We settled on Microsoft Office, so Sarah will be helping with training, implementation, and she will make sure we get all of our documents migrated over. Thank you for the opportunity to serve!

Two Year Public Sector: Written report. Final year as sector rep. Thank you for the opportunity!

Private Sector: Written report. Susan hopped in late to take over. Looking forward to hopefully working together a little better as a sector.

Four Year Public Sector: Written report presented by Renee.

Associate Sector: No written report. Presented by Jodi. Thanks to Robb Cummings for your help with hosting the NeASFAA coffee talks.

Association Governance: Written report. Also refer to Bylaw change document. We addressed a variety of topics on the P&P.

Corporate Development: No written report. Presented by Renee. No corporate income this year due to conference being virtual. Enjoyed hosting coffee talks!

Finance and Audit: Written report. Susan came in late and took over for Laura. Thanks to Laura for all of your help in the beginning, and thank you to Sheila J. for helping Susan get things wrapped up after Laura had to step down. No issues were found with the audit. We also built the 21-22 budget, made some minor changes. Refer to proposed budget doc for 21-22.

Membership Connections: Written report. Thanks to everyone on the committee for all of your help this year! We did a refresh on the website and added the new logo to everything. Sent out membership renewals over the summer, also reached out to institutions who aren't yet members.

PDRC: Written report. We had a fall training series that was well-attended, spring conference was also virtual and well-attended. We had a lot of first time attendees. Hopefully we'll be able to get back to in person events again soon. Thanks to the committee, special thanks to Richelle Saalfeld and Matthew Johnson for stepping up and helping out!

SFRC: Written report. Diana presented on behalf of Ritchie. We sent several letters of testimony for various bills in support of student financial aid related concerns. Thank you to the committee members!

Training 2020 and Beyond: Written report. We had a comprehensive discussion about strategies for training within our association. Thank you to Paula and Vicki for your assistance. Thanks also to all the NeASFAA members for taking the training survey. Main takeaways – flexibility is important for training, virtual trainings are helpful and affordable. We also had responses indicating that personal connections are critically important, so membership seems to be looking forward to more in person training opportunities when it is safe to do so. There are many big changes coming in the next few years, so that will give us many training opportunities. Thanks to the sector reps and the board!

New Business:

21-22 Budget Approval – Main budget updates: We are changing the dues structure. Reducing dues for smallest tier of schools by \$25, increasing dues by \$100 for two largest tiers of institutions. We included line item for fall credentialing in case we decide to do credentials. We added in a line item for Microsoft Business Annual Expense. Also added a line item for Quickbooks online. We balanced the budget with reserves, but we didn't end up having to dip into our reserves, and we don't expect we will need to.

Bylaws Change – 501 (c)(3) to 501 (c)(6) – We learned that NeASFAA was listed as a 501 (c)(3) within our bylaws and P&P, but we actually are categorized as a 501 (c)(6). We made changes to the language in both places to make this correction. Membership does not need to vote on P&P changes, so we made that update already, but we do need a vote to update the Bylaws. Motion by Erinn to approve the updated language to change our Bylaws from listing NeASFAA as a 501 (c)(3) to a 501 (c)(6) instead. Second by Lisa. Motion carries.

Election Results – Incoming Board Goals for 20-21: Thank you to everyone who ran! We look forward to the new board members taking over. We have a few goals we hope to accomplish. Creating 3 taskforces. First taskforce will be a focus on safety and helping to advise the board on how to safely return to in

person activities, take care of ordering any PPE needed for in person events, etc. Second taskforce will be a continuation of implementing Microsoft 365, ensuring board members have access and are trained, migrating documents, etc. Third taskforce will be a focus on training the association on FAFSA simplification changes that will be coming out, best practices, implementation of any changes. Paula will lead taskforce on Safety, Sarah will lead taskforce on Microsoft 365, Becca will lead taskforce on FAFSA Simplification.

Awards:

Summer Institute Winner: Congratulations to Andrew Landrum at UNO

Rookie of the Year: Congratulations to Susan Collins!

Bob Minturn Award: Congratulations to Linda Butcher, you are missed!

Distinguished Service Award: Congratulations to Ritchie Morrow!

Retirees: Congratulations to Les Monroe and Jan Duensing

Years of Service, Babies: Congrats to all!

Passing of the Gavel: As Justin's first item of business, he wants to say thank you to Renee for serving as President this year, especially doing all of this during a pandemic. He hopes he can build upon the leadership she started.

Adjournment: Motion to adjourn by Mary. Meeting adjourned at 2:35pm.

Next Association Business Meeting:
March 2022 - 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 25, 2021
Four-Year Public Sector Report

I was appointed as the Four Year Public Sector Representative position in March 2020. Since this time, I have attended each Board meeting.

I hosted two zoom Director Round Table meetings, one in May and another in November. At these meetings, we had great discussions around items that have been effecting all of our offices this last year and how we are adapting to the challenges and changes. Some of these items included the CARES Act and reporting, declining FAFSA completion and ASLA Processing.

I have enjoyed and learned so much this last year. I look forward learning more and getting to know more of my colleagues as I continue to be the Four Year Public Sector Representative.

Respectfully Submitted,

Sheila Pourier

NeASFAA Spring Conference

April 2021

Associate Sector Representative submitted by Jodi Vanden Berge

There is not a lot to report from the Associate Sector this year. I have sent emails periodically asking about any concerns the Sector may have or items to be brought up at Board Meetings. There were no concerns to be discussed at the Board Meetings.

We owe a thank you to Robb Cummings (Corporate Development Chair) for including the Associate Sector in hosting Happy Hour and Coffee Break sessions for NeASFAA.

I believe the Associate Sector is just ready to start a new normal and join colleagues at conferences again.

NeASFAA Bylaw Change proposed for March 2021 Association Business Meeting

Purpose:

Correction to IRS tax code section in NeASFAA Bylaws to identify NeASFAA as a 501(c)(6) corporation.

Rationale:

The association's articles of incorporation identify NeASFAA as a 501(c)(6) corporation; however, the Bylaws list the IRS tax code section as 501(c)(3). The Bylaws need corrected. The P&P correction was approved during the May 2020 Board meeting.

Current language:

Article II: Purpose

The Association, organized as an educational and charitable organization within the meaning of section 501(c)(3) of the Internal Revenue Code, as amended...

Proposed language:

The Association, organized as an educational and charitable organization within the meaning of section **501(c)(6)** of the Internal Revenue Code, as amended...

NeASFAA Annual Association Business Meeting
Association Governance Committee Report
Sheila Johns
March 2021

The Association Governance Committee was comprised of Marty Habrock, Justin Brown, Ritchie Morrow, and Sheila Johns.

The committee was tasked with reviewing and making revisions, when required, to the association's Policies and Procedures Manual and Bylaws in the following areas:

- Correction of the IRS tax code as listed in the P&P from 501(c)(3) to 501(c)(6), and confirmation that all tax and corporate documents referenced the correct code.
 - A corresponding correction was made to the tax code reference in the association's Bylaws.
- Reviewed the wording in the P&P and Bylaws to ensure the current practice of Treasurer signing is in compliance with Bylaws, and it was determined to be in compliance.
- Reviewed the audit responsibilities in the P&P and recommended revision to the Finance and Audit section regarding the timeframe for audit completion to agree with the Treasurer's section.
- Modified the P&P to incorporate the addition of a 2nd Summer Institute scholarship, include the two tracks for the scholarships based on experience level, establish the timeframes for collection of applications and awarding, and provide the Board with discretion for scholarship awarding should Summer Institute not be held as scheduled.
- Removed reference to "Dropbox" in P&P and replaced with "electronic storage location" in preparation for discontinuation of Dropbox usage.

The committee timeline was updated as required for P&P updates or revisions.

Thank you to the other members of the committee for the time committed to serve on the association's behalf and for their thoughtful consideration of the topics presented to them.

Respectfully submitted,

Sheila Johns
NeASFAA Past President and
Association Governance Chair



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

Finance and Audit Committee Report

March 24, 2021 Meeting

The Finance and Audit Committee conducted the Association's annual audit for fiscal year 2019-2020 on November 19, 2020. The meeting was held virtually via Zoom due to restrictions on our respective campuses due to COVID-19. The audit took a bit more time than it would have if the committee had been able to meet in person, however, we were able to successfully complete the audit. Laura Thayer-Mencke, Susan Frodyma and Wendy Cobb were present for the audit. Janice Volker (past treasurer) and Lisa Gdowski (current treasurer) were also in attendance to answer questions. (Janice and Wendy were together in the Office of Financial Aid at UNO and had the hard copy of the books.) The committee members followed the audit guidelines as written in the NeASFAA Audit Guide. The committee concluded that NeASFAA is financially healthy and that the responsibilities of the Treasurer are being conducted properly.

Budget request forms were sent to the NeASFAA Committees and Board officers on 3/1/21. The budget figures were compiled on the proposed budget worksheet for the 2020-21 year based on projected budgetary expenses and income submitted.

A budget work session was held via Zoom Meeting on 3/8/21. Susan Frodyma led the meeting with Sheila Johns, Justin Brown, Wendy Cobb and Lisa Gdowski in attendance. The group prepared the 2021-22 Budget Proposal. The final copy has been made available via the Drop Box.

Some items that were discussed during the Zoom meeting on 3/8/21 regarding income were having no Fall training since RMAFAA will be held in Omaha, having a spring in-person conference, and a slight increase in membership dues for the largest schools in the state. We also discussed our reserve of cash and CD's and are researching investment options. The expenses from each committee and Board officers were also reviewed.

Respectfully submitted,

Susan Frodyma

Finance and Audit Committee Vice Chair

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 to 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

Proposed 2021-22 NeASFAA Budget

INCOME			
Membership Income	10,000.00		
Interest Income	12.00		
Reserve (to balance)	7,020.00		
Spring Conference	11,100.00	Note: total on budget submitted contained calculation error	
Credentiaing Sessions	1,900.00		
Fall Training	0.00		
TOTAL INCOME	30,032.00		
EXPENSES			
Membership			
Welcome Project	100.00		
Printing/Postage	25.00		
Total Membership	125.00		
PDRC			
Meeting Expense	400.00		
Credentiaing	1,900.00	cost of 10 sessions	
Fall Training			
Meals/Breaks	0.00		
Printing/Postage	0.00		
Credential Material	0.00		
Speaker Expense	0.00		
Facility Expenses	0.00		
Spring Conference			
Entertainment	500.00		
Meals/Breaks	9,500.00		
Printing/Postage	250.00		
Speaker Expense	4,050.00		
AV Equipment	100.00		
Credentiaing Material	0.00		
Prestigious Awards	550.00		
Virtual Meeting/conference Space (Zoom)	700.00		
Total PDRC	17,950.00	Note: total on budget submitted contained calculation error	
President/President Elect			
Board Meetings	250.00	2 virtual and 2 in-person board meetings	
Transitional Board Meeting	0.00	virtual	
Leadership Conference	3,000.00	Will be 2 instead of 1: 2022-23 Pres-Elect and 2022-23 Treasurer	
NASFAA Conference	1,500.00	Shorter conference in 2021, fewer hotel nights needed	
RMASFAA Conference	1,000.00	Cheaper since will be in Omaha, so no flight needed	
RMASFAA Support	625.00	One time increase due to RMASFAA in Omaha	
Summer Institute Scholarship	1,500.00	2 scholarships (intermediate/advanced and beginner)	
President's Task Force: Safety	1,000.00	COVID-19 supplies and/or additional liability insurance, if necessary	
President's Task Force: Admin. Business	0.00	(Is included in Secretary budget) Consulting or other costs for implementing Microsoft Business	
President's Task Force: FAFSA Simplification	850.00	Meetings, materials, travel, etc.	
Total Pres/Pres-Elect	9,725.00		
Secretary			
Cards/Memorials/Flowers	75.00		
Microsoft Business Basic Implementation	756.00	(will also have an ongoing cost each year)	
Total Secretary	831.00		
Treasurer			
Assoc Liability Policy	500.00		
Banking Expense	0.00		
Nonprofit Corporation Biennial Filing	0.00	will need to include in 22-23 budget (was \$23 in 20-21 budget)	
Change of Agent Fee	0.00	will need to include in 22-23 budget (was \$10 in 20-21 budget)	
Tax Preparation	50.00		
Postage	11.00		
Quickbooks Plus Online	840.00		
Total Treasurer	1,401.00		
TOTAL EXPENSES	30,032.00		

Notes

2020-21 Acutal Membership Income			
Institutional	\$7,275		
Associate	\$2,500		
Total	\$9,775		
2021-22 Projected Membership Income			
Institutional	\$7,200		
Associate	\$2,800		
Total	\$10,000		
Spring Conference Breakdown			
65	\$150	\$9,750	attendees*
3	\$450	\$1,350	exhibitors*
		\$11,100	
*based on historical data			
Fall Training			
0	\$50	\$0	Neophyte
0	\$50	\$0	Advanced
		\$0	*
*no fall training in 2020 due to RMASFAA conf in Nebraska			
Credentiaing			
\$1,900			October (CCC GI)
\$0			March (UNL)
\$0			March (WNCC)
\$0			April (Midland U)
\$1,900			income to break even with cost

1. consider charging for the spring conference credentialing sessions
2. consider increasing membership fees
3. need a projection for Divots Spring Conference
4. Sheila will look up annual fee increases for NASFAA and RMASFAA

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 Annual Association Business Meeting
Past President Report
Sheila Johns
March 2021

- Completed term as Nebraska state delegate to the RMASFAA Board. The state delegates updated a state delegate handbook for the benefit of future state delegates.
- Chaired NeASFAA Association Governance committee (separate report provided)

Thank you for allowing me the honor to serve. It has been a pleasure working with the members of this association.

Respectfully submitted,

Sheila Johns
NeASFAA Past President

**NeASFAA Annual Association Business Meeting
President-Elect Report**

Justin Chase Brown
March 2021

It has been a pleasure to serve as your President-Elect this year. I have engaged in the following activities this year on behalf of the association:

- Provided onboarding and training for the current board and coordinated committee leadership.
- Worked with President to navigate COVID-19 issues and round-table discussions for CARES Act.
- Worked with Association Governance to revise our policies and procedures and version control.
- Held nominations and elections for the 2021-2022 board for positions up for election.
- Solicited information via survey regarding member satisfaction with NeASFAA.
- Gathered bids and worked with a designer on our new NeASFAA logo.
 - Worked with Membership Connections to update logo on website.
 - Developed a new letterhead with new logo for association use.
- Held nominations and selections for the scholarship to attend RNASFAA Summer Institute.
 - Congratulations to Andrew Landrum at UNO
 - The deadline for beginner applicants (3 years or fewer) is April 15
- Developed scholarship application for RNASFAA SI and worked with Nominations & Elections Committee to select Andrew Landrum at UNO for our intermediate/advanced recipient.
 - The beginner application is available now and due April 15.
- Reviewed legislative bills being introduced with the State & Federal Relations Committee.
- Elected as Vice-President of RNASFAA and will serve as Vice-President Elect this year while Renee, as Past President, serves as our RNASFAA delegate for NeASFAA.
- Worked with Finance and Audit, Treasurer, & Past President on 2021-2022 budget and beginning discussions on NeASFAA's investment strategy moving forward.

Priorities for 2021-2022

- As we transition into our new year, I'm excited to build on the success of Renee's Presidency and commit to focusing on the following priorities:
 - **Priority 1:** Safely return to in-person activities this year.
 - **Priority 2:** Continue implementation of Microsoft Business for association governance.
 - **Priority 3:** Share information and knowledge on FAFSA Simplification Updates, ED implementation, and best practices with our Nebraska colleagues.
- I'm excited that in addition to our elected leaders and committee chair volunteers that Paula Kohles, Sarah Standley, and Becca Dobry have agreed to help NeASFAA with these priorities!

I am looking forward to serving as your President for 2021-2022.

Respectfully submitted,

Justin Brown
NeASFAA President-Elect



2020-2021 BOARD OF DIRECTORS

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
Capital 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

NeASFAA Annual Business Meeting

March 26th, 2021

President Report – Renee Besse

It has been an unconventional, busy, interesting, and challenging year in so many ways. I am amazed at the resiliency of the NeASFAA Board as they have not only kept the association running but they have thrived and ignited change and excitement. It has been my honor to continue to serve NeASFAA's - this time as your President.

Many of the items below will be found in committee and board reports because they are the true workhorses of the association. Here are some of the highlights:

1. Several Board/Committee changes but we ended up with all positions filled and a strong cohesive group.
2. Road to Relevance books were purchased for all Board Members. A great learning resource that will be passed on to the next Board.
3. Board Orientation moved to Zoom and was led by Brenda. She walked us through activities that helped the Board focus on our mission and goals. We walked away with a working document for committees.
4. Many infra structure update/upgrades to NeASFAA –
 - Quickbooks Online
 - New Logo – same company as RMAFAA used so there is continuity with their logo with our new design. website, printed documents
 - NASFAAs Leadership Conference was virtual – Because of the reduced cost we were able to offer attendance to all voting Board Members. NeASFAA was able to 'send' Erinn Brown, Sheila Pourier, Lisa Gdowski and Kim Vanosdall.
 - End of era with DropBox and move to Microsoft Business - @neasfaa.org emails. TEAMS, Extensive Storage.
5. Sent a press release on behalf of Nebraska to get the work out regarding SNAP and Broadband benefit. This can be found on our webpage under Industry News.
6. Task Force – What does Training Look Like 2020 and Beyond
7. Task Force – move out of dropbox. Microsoft Business Basic – Teams, Storage, @neasfaa.org emails.
8. Sector Round tables virtual meetings– discussion regarding CARES awarding, how campuses were navigating Covid.
9. Associate Sector -Coffee Breaks – chance to share.
10. Signed Contract for Spring 2023 Conference at Ramada Inn in Grand Island



Private College Sector Report

I joined as the representative late, but attended all board meetings from when I joined to the last.

The Private Sector met in November 2020 and discussed the NCAN FAFSA Tracker and CARES Act and prior to this meeting I reach out to seek input from my colleagues of anything that they would like to share, but mostly got staff change responses.

Due to the pandemic another meeting wasn't schedule, but our sector participated in the monthly Coffee Break sessions.

There have been some changes within our individual organizations with institution moves and lack of lead positions being filled so I hope that 2021-2022 will be better as a whole.

I did send out a final email requests for stories, pictures and announcements as well as a request for annual nominations but did not get any response. I would like to brainstorm ways that our group can be stimulated into action and participation going forward.

Respectfully,

Susan Collins
Private College and University Sector Representative

Secretary Report
NeASFAA Association Business Meeting
March, 2021
Sarah Standley

Minutes were taken at all the Board of Directors meetings and last year's Association Business meeting, and they were uploaded into the dropbox.

I reassigned Dropbox folder permissions when the new BoD came along in March 2020.

I was on a taskforce to meet with various vendors to evaluate options for a new storage system since we are reaching our Dropbox capacity. I assisted with the final research components to solidify Microsoft Business Basic as the best choice for NeASFAA's storage solution. This product will allow us to create NeASFAA email addresses, it has more storage than we would ever need, and it will provide us a platform to host virtual board meetings via Microsoft Teams. As an added bonus, it is incredibly cost-effective. After we settled on 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.

Respectfully submitted,
Sarah Standley

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

Report to the NeASFAA
Ad Hoc Committee on Training
March 24, 2021

The NEASFAA Board of Directors, under the direction of President Renee Besse, convened a task force in the spring of 2020 to revisit a primary aspect of the organization's mission: ". . .to promote the professional preparation, effectiveness and mutual support of persons involved in student financial aid administration." Within its statement of purpose, NeASFAA exists to "provide training for newly appointed aid officers and develop professionalism among aid officers in Nebraska".

A significant portion of the membership dues NeASFAA receives are dedicated towards training and professional development. The creation of this task force provides an opportunity to reflect on current activities and consider how, over the next three years, the association leaders might consider changing training and professional development to better meet the needs of the membership.

It should be noted that the task force was established before COVID-19 erupted. The task force conducted a survey of members in the summer of 2020 during the pandemic. These circumstances are reflected in both the feedback the task force received from members and the recommendations we are providing to the Board.

Summary of Recommendations:

1. Institutions of higher education have been impacted by the global pandemic in multiple ways. Some of those ramifications are yet unknown. Therefore, NeASFAA should avoid any significant changes to its training and professional development programs over the course of the 2021-2022 year.
2. Quality Matters. The quality of training/professional development provided by the Association is the most important factor to members.
3. Distance Learning is Acceptable. Members have experienced more distance delivered training and they now see advantages to it.
4. The current calendar works. Fall training that is typically a drive-in, drive-out program along with the tradition two-to-three -day spring conference is still supported.

Summary of Project:

The task force determined during our first meeting that a survey would provide a good starting point for this project. A consensus was reached that the survey needed to wait however until the summer when the pressure to administer the CARES Act and some of the disruptions related to the pandemic were reduced. The task force developed a Qualtrics survey of members (Attachment I) which was sent via email to members in late July. Two-hundred and five individual surveys were sent. Responses were received from 60 members. Survey responses were divided among three of the task force members by sector for a thorough review. We shared our analysis and found a fair amount of common ground. The primary themes reflected from the survey drive our recommendations.

Recommendations:

1. Many of the survey responses received are influenced by the current circumstances surrounding the pandemic. We do not know how our schools and members will emerge from this. Therefore, any significant changes may be best delayed until that is clearer for NeASFAA leadership. Specifically, there were indications from some that budgets were reduced for the current year. Whether funds for travel and training would be restored at the same level in the future is not clear at this point. Prior to launching training/professional development initiatives for Fall of 2021 and Spring of 2022, we recommend a focused survey on this question be disseminated again.
2. Respondents to our survey emphasized repeatedly, no matter who and how the information is provided, quality matters most. Therefore, NeASFAA leadership should prioritize the quality of the information when planning training and professional development programming. This was prioritized over cost. This was prioritized over the quality of the presenter. That may indicate our members are willing to participate in training even if the presenter is not a “superstar”. Additionally, in comments provided on the survey respondents indicated that “meaty” topics are attractive. There is a need to stay “on top” of changes in statutes and regulations. Nuts and bolts training topics should be prioritized when developing content.
3. Opportunities for training and professional development delivered using distance platforms are now perceived as acceptable, even popular. Post-COVID-19, this may need to be revisited. But the survey indicates that a significant number of members prioritize distance delivered training over in person. There were some generational differences reflected in the survey responses in this area. An area of investment the association may want to consider investigating are platforms for providing quality training via distance. While there could be significant cost there could also be significant return on the investment.
4. Support remains high for the current calendar: providing programming in the fall and a 2-3-day spring conference. However, respondents did indicate some erosion in the desire for or ability to attend a full two to three-day conference. There is significant interest in drive-in, drive-out same day training opportunities. This reinforces our recommendation to assess the readiness for our members to return to normal activities after the pandemic subsides. Specifically, the survey should determine if institutional budgets are reinstated at the level to support attendance at two to three conferences verses one day activities.

Summary:

When this project was proposed none of us had any idea how fundamentally everything was going to change for NeASFAA and all its members and their institutions. The professional development and recognition committee deserves congratulations for quickly pivoting over the past year to provide the spring conference via distance. This fall the NeASFAA Discussion Sessions along with the panel discussion on professional judgment and COVID 19 have provided excellent information to members in a socially distant manner. The NeASFAA Happy Hour events have given us the opportunity to network. Kudos to all who have worked on these efforts.

The strength of NeASFAA has always been the relationships we have developed as colleagues and friends over the years. That is rooted in the opportunities we have invested in to be together at conferences and training event. In a post-COVID world training and professional development that occurs in a conference location, away from our offices when our attention can be focused on the content and each other will be welcomed. But we should not discount what we learned over the past year about distance learning. Just as our students have had to adapt, so have we. We are grateful for the opportunity to assist the association with this important effort and look forward to helping advance the goals of the association in whatever way we can.

Paula Kohles, Director of Financial Aid, University of Nebraska Medical Center, NeASFAA Past President 2001-2002

Vicki Kucera, Director of Financial Aid, Central Community College, NeASFAA Past President 2002-2003

Mary Sommers, Director of Financial Aid, University of Nebraska Kearney, NeASFAA Past President 1999-2000, 2007-2008.

We are grateful for the assistance of the current sector representatives who assisted in the survey design and promoted its completion among its members:

Sheila Pourier, 4-year Public

Kimberly Vanosdall, 2-year Public

Susan Collins, Private Sector Rep

Jodi Vandenberg, Associate Sector

We are also thankful for Erinn Brown, chair of the Membership and Communication Committee who assisted in providing the contact information for the survey. Thanks also to Grace Magill, Communications Coordinator at UNK who managed the Qualtrics survey.

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	
RMAASFAA Conference	\$ 1,500.00	
RMAASFAA 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