

# **SASFAA Conference/Meeting Manual and Guidebook**

## **Purpose**

This manual and guidebook was compiled as a tool to be utilized by future SASFAA and/or State Presidents, Conference Chairs and Local Arrangement Chairs as a means to organize all aspects of planning and putting on the best possible conference at the state or regional level. Please be aware that is only a “guide” and should be used as a tool that can be improved upon as the needs change from year to year and state to state.

The manual and guidebook encompasses many facets of a conference and it may contain some information that is not necessary in your planning. But, the committee felt that it should contain as many items as possible in order to address any item/issue that may come up in the planning stages. There are many samples/examples/attachments included that are for reading purposes only and not to be used as actual items such as actual hotel contracts, resumes and auxiliary contracts. We felt it was important that you be able to read actual documents that could impact the budget of your conferences. We have also included many items that you will be able to utilize as actual tables and charts such as master schedules, menu charts, session charts, AV charts, etc.

Included below is a copy of SASFAA Mission Statement and Vision Statement as we felt it was important to adhere to the founding principles of SASFAA and incorporating those principles throughout the manual and guidebook.

## **Mission Statement**

The Southern Association of Student Financial Aid Administrators was founded in order to establish a community of members, who through the sharing of ideas and professional competencies and experiences would serve more ethically and effectively the diverse needs of students, parents, and institutions. The present and future existence of the association continues to be based on this founding principle.

To facilitate this mission, the association pledges to support professional communications in all areas concerned with the administration of student educational financing programs. The association is committed to developing future leaders by actively involving its membership. To accomplish the goals set forth by the association in a dynamic environment, the Southern Association of Student Financial Aid Administrators offers personal and professional development opportunities and embraces sound principles and practices of aid administration.

## **Vision Statement**

The Southern Association of Student Financial Aid Administrators is a dynamic organization serving practitioners, users and providers of student financial aid programs. This effort occurs in an environment of mutual respect and support which encourages questions, discussion and the shaping of ideas – thus promoting opportunities, equity, and access in and to higher education.

## **Acknowledgements**

It is most difficult to give specific credit when this manual and guidebook is the compilation of ideas and experiences of so many Past Presidents, Conference Chairs and Local Arrangement Chairs, who after each conference have gathered together to discuss what worked well (and what didn't), what needed improvement, and recommendations for next years conference.

This guidebook was started back under the Presidency of Vernetta Fairley and the original guidelines were amassed by Herb Vescio. We thank them both for their initial insight! We hope the information in this manual will be an effective tool in the planning of any conference and as a training tool for sessions/workshops in the future.

Many thanks go to the following individuals who gathered much of this information as they played vital roles in SASFAA Conferences in the past:

Lisanne Masterson, Brent Tener, Ron Gambill, Jackie Bell, Todd Woodlee, Freida Jones, Michael Morgan, and Zita Barree.

We hope to expand this manual to include information about the New Aid Officers Workshop and individual committee meetings and board meetings on a smaller scale. This is a living document which we hope will be a source of information and knowledge for anyone wanting to become a chair in the future.

Respectfully submitted,

Janet Sain, Special Projects Chair

# TABLE OF CONTENTS

- I. Generic Information**
  - 1. Conference Chair Timeline (attachment 1)
  - 2. Past Conference Themes
  - 3. Past Conference Sites
  - 4. SASFAA Bylaws
  - 5. Policies & Procedures
  - 6. Hotel Contract
  
- II. Financial Information**
  - 1. Budget
  - 2. Monitoring Expenses
  - 3. Credit Card
  - 4. Conference Call Account
  - 5. Contracts
  
- III. Meetings/Reports**
  - 1. Board Meetings (attachments 2, 3, 4)
  - 2. Committee (attachments 5, 6, 7, 8, 9)
  - 3. Newsletter (attachments 10, 11, 12)
  - 4. Annual Report (attachment 13)
  
- IV. Conference Committee**
  - 1. Selection (attachments 14, 15)
  - 2. Responsibilities (attachment 16)
  - 3. Volunteers
  
- V. Conference**
  - 1. Theme
  - 2. Agenda (attachment 17)
  - 3. Speakers
    - i. Keynote
    - ii. General Session Speakers
    - iii. Concurrent Session Speakers
    - iv. Presenter Guidelines (attachment 18)
    - v. Moderator Guidelines (attachment 19)
  - 4. Concurrent Sessions (attachments 20, 21)
  - 5. Printing
    - i. Pre-conference postcard (attachment 22)
    - ii. Printed program (attachment 23)
    - iii. Pocket Directory
  - 6. Charity (attachment 24)
  - 7. Invitations (attachments 25, 26)

8. Registration
  - i. Conference Packets
  - ii. Name Badges
    1. Ribbons
    2. Stickers
  - iii. "Giveaway"
9. Signage
10. "Script"/Event Notebooks (attachment 27)
11. Seating/Name Tents (attachments 28, 29)
12. Conference Shirts (attachment 30)

**VI. Hotel**

1. Rooms
  - i. Complimentary (attachment 31)
  - ii. VIPs
  - iii. Upgrades
  - iv. SASFAA Hospitality
  - v. Host State Hospitality
  - vi. Computer/Voting Lab
  - vii. Banners
2. Food
3. AV
  - i. Registration – Phone Line
  - ii. General Sessions
  - iii. Concurrent Sessions
  - iv. Computer/Hands-On Learning Labs

**VII. Electronics/Utilities**

1. Website (attachment 32)
2. Conference Committee Listserv
3. Conference Calls
4. On-Site Electronics
  - i. Registration
  - ii. Voting
  - iii. Computer Lab
  - iv. Hands-on Learning Lab
5. AV
6. Walkie-Talkies

**VIII. Vendor/Sponsor**

1. Vendor/Sponsor Chair
2. Exhibit Area
3. Drayage Company
4. Shipping
5. Sponsored Events
6. Program

**IX. Attachments**