

# SASFAA Summer Workshop Guide

Last Updated: June 2015

## Summer Workshop

The vice president is responsible for planning and conducting the summer workshop.

## Workshop Staff

Workshop staff generally includes:

- Vice president
- Curriculum coordinator
- Instructor
- Site coordinator
- Business Partner(s)

The vice president is responsible for the selection of the curriculum coordinator and instructors. The vice president shall make every effort to select instructors and other workshop staff representative of the entire SASFAA region in terms of school type and state, sector and diversity. All workshop staff must be

- SASFAA members and members of appropriate state associate.
- Board approved

## Workshop Site Selection

The current vice president shall recommend a workshop site to be used by his/her successor. The executive board shall review the recommendation. In this way, the association is able to secure the most attractive sites that meet site specifications or criteria.

If a workshop site is satisfactory and meets the association's needs, serious consideration shall be given to using that site for more than one year.

The vice president should consider sites in all of the nine SASFAA states.

The vice president should research potential sites and coordinate onsite visit. During the visit, the vice president or designee should meet with the site coordinator and view the facilities that will be used.

If the vice president is recommending a site for his/her successor, site recommendations should be made no later than the third board meeting of the year (generally held in conjunction with the annual meeting.) It is preferable that the recommendation be made at the second meeting of the year.

## Workshop Site Specifications

At a minimum, a workshop site shall meet these criteria:

1. Accessible location. It is preferable that the workshop site be accessible via an airport that has jet service. "Regional" jet service would be considered acceptable.
2. On campus housing to accommodate 125-175 people – including workshop staff and participants. Suite- style accommodations with semi-private bathrooms are preferable, but other accommodations should be considered if the site meets other criteria.

3. On campus dining should be available to accommodate workshop participants and staff.
4. Classroom facilities in adequate number and size. Generally:
  - a. Individual classrooms that accommodate up to 20-25 students – number of classrooms determined by the total size of the workshop.
  - b. Auditorium or large lecture room that accommodates up to 125-175 students.
  - c. Computer lab
  - d. Conference room or classroom that can serve as conference headquarters.

The classrooms should be equipped with up-to-date technology. At a minimum the classes should have projector, computer and internet access.

5. Adequate facilities to support social activities outside the classroom.
6. Adequate facilities for registration, check-in, and check-out activities.
7. Facilities should meet ADA requirements so all people can participate.

### **Recommended Workshop Schedule:**

- Friday - Workshop staff arrive
- Saturday - Workshop staff prepare for week; registration for early arrivals
- Sunday – Registration; workshop begins in late afternoon; ice breaker activities
- Monday through Thursday – class activities and social activities
- Thursday - banquet celebration
- Friday – Workshop ends by lunch; workshop staff has final wrap-up meeting

### **Job Descriptions for Workshop Staff**

#### **Curriculum Coordinator Job Description**

The curriculum coordinator is key to a successful summer new aid officers' workshop. In addition to providing the curriculum for the workshop, he/she guides the instructors in classroom instruction, giving them tips and training as required. The curriculum coordinator also provides the curriculum and selects the instructors for the one-day workshop held in conjunction with the annual conference – the February prior to the summer workshop for which he/she is responsible.

The curriculum coordinator is expected to arrive at the summer workshop site two days prior to the beginning of the workshop and remain through the close of the workshop.

He/she is specifically responsible for the following activities:

- Developing agenda for workshop and classroom activities, in conjunction with vice president.
- Developing curriculum for workshop – including slides for presentations, handouts, scripts for instructors, as needed, case studies, etc., ensuring that information is accurate and up to date.
- Preparing instructor and participant notebooks for printing.
- In conjunction with vice president, pairing instructors into teaching teams.
- Guiding faculty in classroom instruction, providing tips and training in presentation skills as necessary.
- Correcting any instructional errors, presentation problems, etc. as they arise.
- Maintaining database of participants as they register – to include name, institution, address, voice, fax, email, title, length of time in position, length of time in the field, self-assessment score, and classroom assignment.

- Placing participants in appropriate classrooms, based on years of experience as provided on the registration application.
- Conducting, in conjunction with vice president, meetings with instructors and business partners during the annual conference, planning retreat, during the workshop.
- Serving as a resource for instructors and participants.
- Encouraging participants in classroom and social activities, helping them to feel welcome and comfortable.
- Other activities as requested by the vice president.

### **Instructor Job Description**

The workshop instructor is a vital element in a successful summer new aid officers' workshop. He/she provides classroom instruction and becomes a mentor to the participants. This position also serves as the instructors for one-day workshop held in conjunction with the annual conference.

The instructor is expected to attend a planning retreat in the spring prior to the workshop. The instructor is expected to arrive at the summer workshop site two days prior to the beginning of the workshop and remain through the close of the workshop. The instructor is also expected to be a current member of SASFAA and their respective state association.

The instructor is specifically responsible for the following activities:

- Reviewing curriculum materials provided. This should be done prior to arrival at the workshop.
- Reviewing case studies as requested by the curriculum coordinator.
- Working closely with teaching partner to make the classroom experience of the highest quality possible.
- Participating in training provided by the vice president, curriculum director, or other, designed to enhance presentation skills.
- Providing supplemental materials, suggestions, etc. to the curriculum director and vice president to ensure the highest quality workshop possible.
- Encouraging participants in classroom and social activities, helping them to feel welcome and comfortable.
- Other activities as requested by the vice president and/or curriculum director.
- **Promote the new aid workshop within their respective state in conjunction with the vice president.**

### **Business Partners Job Description**

Business partners help set the tone of the social activities for the workshop. They also run errands as required, freeing the vice president, curriculum director, and instructors to take care of other aspects of the workshop.

The business partner is expected to arrive at the workshop site two days prior to the beginning of the workshop and remain through the close of the workshop.

The business partner is specifically responsible for the following activities:

- Meeting and greeting participants.
- Assisting instructors with move-in.
- Assisting participants with registration and move-in.
- Distributing "goody bags" and/or others items for instructors and/or participants (contents to be determined by vice president)
- Encouraging participants in classroom and social activities, helping them to feel welcome and comfortable.

- Transporting faculty, vice president, curriculum coordinator, and other guests to/from airport.
- Transporting faculty, vice president, curriculum coordinator, other guests, and participants to/from appropriate facilities in emergency situations or other “approved” activities. (For example, transporting someone to the pharmacy for a prescription.)
- Stocking social area with food and drink as required.
- Photographing classes, workshop participants, instructors, etc. and having pictures developed for distribution by the end of the workshop.
- Conducting team building activities.
- Printing materials on site – taking originals, picking up copies, assisting with distribution, etc.
- Writing and printing daily newsletter during workshop.
- If necessary, assisting the vice president in making sure that vendors registered for the workshop do not market their products during the workshop.
- Other activities as requested by the vice president and/or curriculum coordinator.

### **Site Coordinator Job Description**

A strong site coordinator is critical to the success of the workshop.

He/she attends the planning retreat prior to the workshop and is available two days prior to the workshop until the workshop end.

He/she is specifically responsible for:

- Providing local arrangements assistance for the summer workshop.
- Working closely with the vice president and the curriculum coordinator in the planning and execution of the summer workshop.
- Acting as the liaison between the host site and the vice president.
- Assisting in making arrangements for workshop accommodations and services.
- Organizing transportation to/from the airport and the workshop site.
- Securing on-site volunteers or paid staff (not paid by the association) to assist with the workshop.
- Other activities as requested by the vice president and/or curriculum coordinator.
- Videotaping PJ skit and putting together video for showing at banquet.

### **Expenses**

The association covers travel and other workshop-related expenses for the site coordinator, curriculum coordinator, instructors, vice president and vice president-elect, and other non-business partner staff. The business partners provide their own transportation to and from the workshop. Room and board is provided for all workshop staff – during the planning retreat and the workshop itself.

### **Suggested Budgets and Cost Containments**

- Class decorations - \$30
- Coordinate with conference chair to order participant bags and name badges/holders.
- Develop a NAOW generic t-shirt that can be used multiple years.
- Business partners prepare staff meals prior to the beginning of the workshop
- Monitor and control printing cost (participants manual)

### **Promotional Piece and Registration**

The vice president shall prepare promotional pieces for publication on paper or the Internet about the workshops, the one-day workshop and the summer workshop. The vice president shall coordinate the online registration forms, in conjunction with the electronic services chair. The vice president shall ensure the general NAOW information is available on the web year round. There should be a dedicated link from the initial web page.

Materials about the workshop shall include (but are not necessarily limited to): (sample enclosed)

1. Site
2. Dates and times
3. Cost
4. Accommodations – lodging, meals – what is provided and what the participant needs to bring with him/her
5. Activities related to the workshop
6. Deadlines for registration and fee payment
7. Tentative agenda and topics
8. Travel Information – airport, campus map, etc

### **Directory of Participants**

Preferably before the end of the workshop, the vice president provides a directory to participants and staff. Information should include: name, address, voice telephone number, fax number, e-mail address, and class designation. If the vice president is unable to provide this directory before the end of the workshop, it is to be provided to participants.

### **Certificate of Achievement/Recognition**

The vice president shall provide a certificate of achievement/recognition to each participant. The vice president should sign certificates. The president and/or curriculum director can also sign the certificate.

### **Contract**

Contracts will be signed by instructors, site coordinator, and curriculum coordinator. See appendix X.

## Sample - Promotional Piece

### Purpose

The SASFAA Summer Workshop is an intense professional development activity designed to provide a working knowledge of the federal financial aid programs, as well as an understanding of the laws and regulations that govern these programs. The curriculum will take the student from A - Z through the basics of financial aid.

### Intended Audience

The workshop is intended for new financial aid administrators with less than five years of experience in the field of financial aid. Other individuals whose professional responsibilities include significant contact with the financial aid process are welcome to attend the workshop on a space-available basis. Registration will be available in February.

### Format of Workshop

A carefully selected faculty of experienced aid officers, selected from the SASFAA states and representing diverse institutions, will conduct the class sessions. The instructors will teach in teams of two and work with the same class of participants throughout the week. Lectures, interactive instruction and case studies will be used throughout the week. The faculty will be on site for the entire week, providing opportunities for ample interaction outside the classroom.

### Curriculum

*Topics to be covered include:*

Application Process	SAR/ISIR	Student Eligibility
Federal Methodology	Federal Title IV Programs	IRS Forms
Verification	Record Keeping	Cost of Attendance
Packaging	Professional Judgment	Cash Management
Satisfactory Academic Progress	Loan Certification Issues	Legislative Process
Debt Management	Customer Service	FERPA
Consumer Information	High School Nights	Annual Reports
Program Reviews	Financial reviews	

### Location and Dates

The workshop will be held on the beautiful campus of University of North Carolina - Asheville in Asheville, North Carolina. All workshop participants will stay in Mills Hall Dorm on campus. Information about UNC - Asheville can be found at [www.unca.edu](http://www.unca.edu) - pictures of the campus can be found at [www.unca.edu/welcome/pictures.html](http://www.unca.edu/welcome/pictures.html).

Participants should plan to arrive no later than 1:00 pm on Sunday, June 18, 2006 to check-in and take care of on-site registration activities. Check-in and on-site registration will be from 9:00 am until 4:00 pm on Sunday, June 18, 2006.

The first class begins at 3:00 pm on Sunday, June 18, 2006. The workshop concludes at 11 am on Friday, June 23, 2006.

Participants may arrive on Saturday, June 17, 2006. Check-in and on-site registration will be available from 12:00 pm until 4:00 pm on Saturday. There is an additional charge if you arrive on Saturday.

Please make your travel arrangements to allow you to arrive before the workshop begins on Sunday afternoon and for you to attend all of Friday morning's activities.

### **Cost**

The registration fee for the workshop is \$650, if registration completed by May 24, 2006 and \$700 if completed after May 24, 2006. The registration fee includes all instructional materials, most meals, housing and your 2005-06 SASFAA membership (\$25). A minimum non-refundable (but transferable) deposit of \$100 must accompany the registration form. Early arrivals - those participants arriving on Saturday, June 18, 2006 will be charged an additional \$30 fee to cover the additional night's lodging.

### **Housing**

Housing is provided in residence halls located on UNC - Asheville's campus. Each apartment has two bedrooms (single occupancy in each bedroom), 1 bathroom, and a living room area. Amenities include one microwave-refrigerator. Basic furniture includes a couch, chair and side table in the living room area and a bed, study desk (with built-in study lamp), chair and wardrobe in the bedroom. Linens are provided (one pillowcase, two sheets, one pillow, one blanket, 2 facecloths, and two towels per person). The suites do not have televisions. Participants will be housed in West and South Ridge Residence Halls. For additional information on the residence halls you can go to: <http://www.unca.edu/housing/files/residence-halls/general-information/>.

All rooms are air-conditioned. Each room has an Internet connection for each person. Each participant will receive a key to their suite/room - there is a \$25 key replacement charge if a key is lost.

## **Attachment A**

Contract examples are included below for summer workshop staff.



**2012 SASFAA New Aid Officers Workshop  
Instructor  
Contract and Code of Conduct Agreement**

*I \_\_\_\_\_ agree to serve SASFAA in the capacity of Instructor and to assist with preparations for the 2012 SASFAA New Aid Officers Workshop (NAOW). Specifically I will:*

1. Attend the NAOW staff retreat in \_\_\_\_\_ on \_\_\_\_\_. I agree to stay on site for the entire workshop. I agree to participate in all workshop-sponsored events.
2. Commit to the period of June 17 – 24, 2012 for the actual workshop, by arriving at \_\_\_\_\_ by 2:00 p.m. on June 15, 2012, assist with workshop preparations, serve in my capacity until June 24, 2012, and participate in the closing staff meeting following the end of the workshop on June 24, 2012. I agree to stay on site for the entire workshop. I agree to participate in all workshop-sponsored events.
3. Receive an honorarium of \$500 in my capacity as NAOW Instructor. I understand that it is my responsibility to report this honorarium payment on my personal income tax return.
4. Immediately notify the Vice President in writing if unavoidable circumstances prevent me from fulfilling any of these agreed upon duties.
5. I understand that the commitment of being a NAOW Instructor is for a one year period of time unless otherwise indicated by the SASFAA Vice-President as that a contract will need to be signed each year.

**CODE OF CONDUCT**

*As a NAOW Instructor I agree to adhere to the following code of conduct:*

1. Possess the presentation skills and financial aid knowledge required to educate participants.
2. Conduct myself in a manner appropriate to SASFAA and the institution which I represent.
3. Demonstrate respect for colleagues, participants, and host institution.
4. Maintain ethical business practices.
5. Personify professionalism befitting a financial aid representative.
6. Adhere to host institution Alcohol Policy at all times while on campus. Consuming alcoholic beverages shall not interfere with my ability to carry out the commitment of this contract.

*I have read and understand my responsibilities and know what is expected of me. I agree to abide by the conduct set forth in this contract. I understand that if I violate this contract and/or code of conduct my honorarium may be revoked. I understand that contract and/or code of conduct violations may be reported to the SASFAA Executive Board and/or my employer.*

\_\_\_\_\_  
*Instructor's Signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*SASFAA VP Signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*NAOW Instructor*

\_\_\_\_\_  
*Runan Pendergrast, SASFAA Vice President*



**2012 SASFAA New Aid Officers Workshop  
Curriculum Coordinator  
Contract and Code of Conduct Agreement**

I \_\_\_\_\_ agree to serve SASFAA in the capacity of Curriculum Coordinator and to assist with preparations for the 2012 SASFAA New Aid Officers Workshop (NAOW). Specifically I will:

1. Attend the NAOW staff retreat in \_\_\_\_\_ on \_\_\_\_\_. I agree to stay on site for the entire workshop. I agree to participate in all workshop-sponsored events.
2. Commit to the period of June 17 – 24, 2012 for the actual workshop, by arriving at \_\_\_\_\_ by 2:00 p.m. on June 15, 2012, assist with workshop preparations, serve in my capacity until June 24, 2012, and participate in the closing staff meeting following the end of the workshop on June 24, 2012. I agree to stay on site for the entire workshop. I agree to participate in all workshop-sponsored events.
3. Receive an honorarium of \$599 in my capacity as NAOW Curriculum Coordinator. I understand that it is my responsibility to report this honorarium payment on my personal income tax return.
4. Immediately notify the Vice President in writing if unavoidable circumstances prevent me from fulfilling any of these agreed upon duties.
5. I understand that the commitment of being a NAOW Curriculum Coordinator is for a one year period of time unless otherwise indicated by the SASFAA Vice-President as that a contract will need to be signed each year.

**CODE OF CONDUCT**

*As a NAOW Curriculum Coordinator I agree to adhere to the following code of conduct:*

1. Possess the presentation skills and financial aid knowledge required to educate participants.
2. Conduct myself in a manner appropriate to SASFAA and the institution which I represent.
3. Demonstrate respect for colleagues, participants, and host institution.
4. Maintain ethical business practices.
5. Personify professionalism befitting a financial aid representative.
6. Adhere to host institution Alcohol Policy at all times while on campus. Consuming alcoholic beverages shall not interfere with my ability to carry-out the commitment of this contract.

*I have read and understand my responsibilities and know what is expected of me. I agree to abide by the conduct set forth in this contract. I understand that if I violate this contract and/or code of conduct my honorarium may be revoked. I understand that contract and/or code of conduct violations may be reported to the SASFAA Executive Board and/or my employer.*

\_\_\_\_\_  
Curriculum Coordinator's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
SASFAA VP Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
NAOW Curriculum Coordinator

\_\_\_\_\_  
Runan Pendergrast, SASFAA Vice President



## 2012 SASFAA New Aid Officers Workshop Development Partner Contract and Code of Conduct Agreement

I \_\_\_\_\_ agree to serve SASFAA in the capacity of Development Partner and to assist with preparations for the 2012 SASFAA New Aid Officers Workshop (NAOW). Specifically I will:

1. Attend the NAOW staff retreat in \_\_\_\_\_ on \_\_\_\_\_. I agree to stay on site for the entire workshop. I agree to participate in all workshop-sponsored events.
2. Commit to the period of June 17 – 24, 2012 for the actual workshop, by arriving at \_\_\_\_\_ by 2:00 p.m. on June 15, 2012, assist with workshop preparations, serve in my capacity until June 24, 2012, and participate in the closing staff meeting following the end of the workshop on June 24, 2012. I agree to stay on site for the entire workshop. I agree to participate in all workshop-sponsored events.
3. Immediately notify the Vice-President in writing if unavoidable circumstances prevent me from fulfilling any of these agreed upon duties.
4. I understand that the commitment of being a NAOW Development partner is for a one year period of time unless otherwise indicated by the SASFAA Vice-President as that a contract will need to be signed each year.

### **CODE OF CONDUCT**

*As a NAOW Development Partner I agree to adhere to the following code of conduct:*

1. Possess the skills and knowledge required as a development partner.
2. Conduct myself in a manner appropriate to SASFAA and the institution which I represent.
3. Demonstrate respect for colleagues, participants, and host institution.
4. Maintain ethical business practices.
5. Personify professionalism befitting a financial aid representative.
6. Adhere to host institution Alcohol Policy at all times while on campus. Consuming alcoholic beverages shall not interfere with my ability to carry out the commitment of this contract.

*I have read and understand my responsibilities and know what is expected of me. I agree to abide by the conduct set forth in this contract. I understand that a violation of this contract and/or code of conduct may be reported to the SASFAA Executive Board and/or my employer.*

\_\_\_\_\_  
*Development partner's Signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
NAOW Development Partner

\_\_\_\_\_  
*SASFAA VP Signature*

\_\_\_\_\_  
*Date*

\_\_\_\_\_  
*Runan Pendergrast, SASFAA Vice President*