



Conference Handbook

Southern Association of Student Financial Aid Administrators

Updated February 2023

SASFAA Conference Handbook

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Section 1 General Information

Purpose

This handbook is a tool to be utilized by future SASFAA Conference Chairs as a means to organize conference planning at the regional level. Please be aware that is only a tool that can be improved upon as the needs change from year to year and state to state.

The handbook encompasses many facets of a conference and it may contain some information that is not necessary in your planning. There are samples, examples, and attachments included for reading purposes only and not to be used as actual items.

Always refer to the SASFAA Policy and Procedures manual for additional information and clarification.

The SASFAA Mission, Vision, and Diversity statements are included as a reminder to the importance of adhering 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 (SASFAA) is a regional organization of individuals from our nine member states that provide an avenue for a support and resource network; offers professional training opportunities that enable and enhance the ethical and effective delivery of educational resources to students; seeks to cultivate personal and professional leadership development; advocates for public policies that support financial aid programs; and, commits to the recognition of the diverse needs in our profession and all of the constituents we serve.

Vision Statement:

The Southern Association of Student Financial Aid Administrators aspires to create an environment of mutual respect and support which encourages questions, discussion and the shaping of ideas in order to promote opportunities, equity and access in and to higher education.

Diversity Statement:

As part of its mission, SASFAA seeks, accepts, and practices the inclusion and involvement of all members in all association activities regardless of age, race, ethnicity, gender, religion, sexual orientation, disability, appearance, professional level, institutional type, or other uniquely defined characteristics.

SASFAA Policy and Procedure Manual 6.6 Conference

The conference committee plans the Association's annual conference that includes training, professional development and networking activities. To achieve these goals, the committee will:

- (1) Coordinate conference activities with the professional development, budget and finance, membership and local arrangements committees;
- (2) Solicit proposals to develop general and interest sessions and secure speakers that appeal to the various sectors and experience levels of the membership;
- (3) Review evaluations from the prior year conference to assess interest and need for appropriate adjustments for current conference plans;
- (4) Plan pre-conference workshops and seminars that address the needs of different segments of the membership;

- (5) Assist in developing the conference budget and adhere to the approved budget;
- (6) Secure volunteers to help perform the duties of the committees;
- (7) Maintain all related correspondence and materials;
- (8) Prepare a conference evaluation for use by the next conference chair;
- (9) Provide conference announcements, news articles and promotional materials to the Communications and Outreach committee for publication to the membership;
- (10) Report on activities and present reports to the Board

The Conference Committee Chair will have Administrator access to the SASFAA website to allow for immediate updates of important conference information listed on the website, and assistance with registration issues.

Section 2 Conference Operational Calendar

Role	Duty	Month
Conference	Send out a call for sessions to the listserv and to the states	July
Conference	Develop tentative budget using previous year's final numbers and information from the current year hotel contract and menus (President will develop a proposed budget prior to August board meeting)	July
Conference	Finalize keynote speaker, if possible	July
Conference	Prepare and submit report by Secretary's deadline	July
Conference	Review budget and expenditures and report any corrections that are needed to the treasurer	July
Conference	Finalize conference theme and logo	July
Conference	Develop tentative session and concurrent session topics to be discussed in detail at the August Conference Committee meeting	July
Conference	Develop tentative conference agenda to discuss at August meeting	July
Conference	Review all local arrangements plans with LAC Chair	July
Conference	Hold Conference Committee meeting in conjunction and at same location as August Board meeting	August
Conference	Discuss general session and concurrent session topics at meeting	August
Conference	Develop subcommittees to work on different sections of the conference, especially sessions (everyone should have input on sessions)	August
Conference	Continue general session and concurrent session presenter contacts	August
Conference	Send out email to listserv regarding hotel rate, registration fees, parking and other important information	August
Conference	Review all local arrangements plans	August
Conference	Finalize Department of Education general and concurrent sessions	September
Conference	Work with Electronic Services Chair on developing web pages for the conference	September
Conference	Continue developing general sessions and concurrent session presenters	September
Conference	Send initial email to all presenters	September
Conference	Obtain AV needs for sessions-work with local arrangements chair	September

Conference	Review all local arrangements plans	September
Role	Duty	Month
Conference	Finalize travel/sessions with VIPs-NASF AA President, NASFAA Chair, NASFAA Trainer, Keynote	September
Conference	Initial development of meal function	September
Conference	Send out email to listserv regarding the tentative agenda and possible session topics	September
Conference	Contact special guests and VIPs for biography, name, title, address, telephone and fax numbers, e-mail and hotel room preferences	September
Conference	Provide hotel with conference agenda	October
Conference	Continue to update information on website as it is finalized	October
Conference	Solicit general session and concurrent session moderators	October
Conference	Review all local arrangements plans	October
Conference	Attend SASFAA board meeting	November
Conference	Prepare and submit report by Secretary's deadline	November
Conference	Review budget and expenditures and report any corrections that are needed to the treasurer	November
Conference	Conference committee members should continue posting information to the state listservs.	November
Conference	Continue to update website with current information by late November	November
Conference	Update conference website and send email messages to the SASFAA listserv regarding conference activities	November
Conference	Review all local arrangements plans	November
Conference	Develop PowerPoint presentation template with logo	November
Conference	Contact special guests and VIPs for arrival and departure times and make arrangements for transportation	December
Conference	Determine source and price of conference bag and name badge holder	December
Conference	Assign sessions to time slots and rooms and notify presenters	December
Conference	Continue to update conference website and send email messages to the SASFAA listserv regarding conference activities	December
Conference	Review all local arrangements plans	December
Conference	Submit report to the SASFAA Nine News	December

Conference	Finalize all session descriptions and have presenters review for content of their session	December
Conference	Order Conference Committee t-shirts	December
Conference	Finalize meal functions	December

Role	Duty	Month
Conference	Finalize all AV needs for sessions	December
Conference	Send initial email to all moderators regarding important info and refer to moderator link on conference website	December
Conference	Invite Past Presidents to the Past Presidents Luncheon	December
Conference	Coordinate and reconcile complimentary registrations with the sponsorship chair and treasurer for VIPs, special guests and appropriate board members	January
Conference	Monitor room block at hotel with site selection chair	January
Conference	Email invitation to President's Appreciation reception to Conference Committee and Board	January
Conference	Continue to update conference website and send email messages to the SASFAA listserv regarding conference activities	January
Conference	Obtain banquet event orders from hotel and start finalizing all events including meal and beverage events	January
Conference	Finalize all general session and concurrent session AV needs	January
Conference	Prepare president's conference "script"	January
Conference	Review all local arrangements plans	January
Conference	Submit report to the SASFAA Nine News	January
Conference	Review program compiled by conference committee member to post to SASFAA listserv	January
Conference	Attend SASFAA annual conference	February
Conference	Prepare and submit report	February
Conference	Review budget and expenditures and report any corrections that are needed to the treasurer	February
Conference	Chair post conference meeting with current and future conference committees	February
Conference	Submit report to the SASFAA Nine News	February
Conference	Send thank you notes and/or letters to all involved with the conference	March/April
Conference	Submit GAP Summary Report to the President by April 1	March/April
Conference	Forward all conference information to the next year's conference chair	March/April

Conference	Incoming conference chair should visit next conference site with president-elect, the next years local arrangements chair and the next year's vendor/sponsor chair	April/May
Conference	Incoming conference chair should finalize committee members	April/May
Role	Duty	Month
Conference	Attend SASFAA transition board meeting	June
Conference	Prepare and submit annual report	June
Conference	Review budget and expenditures and report any corrections that are needed to the treasurer	June
Conference	Incoming conference chair should notify committee members of first committee meeting in July/August and send all preliminary information	June
Conference	Incoming chair should select work group coordinators and send list of responsibilities	June
Conference	Incoming chair should work with President-Elect to determine the next year's conference theme and logo	June

Section 3: Conference Committee

Selection

The SASFAA Policies & Procedures (4.3) provides an outline for who should serve on the Conference Committee. The Conference Committee shall have a representative from each state. Committee member should not serve on the committee for more than two consecutive years. In keeping with the spirit of the SASFAA, Mission Vision, and Diversity Statements and creating a balanced and diverse committee, other criteria to use in selecting committee members should include but are not limited too . . .

- Gender
- Race
- Ethnicity
- School/ Sector Type (4-year, 2-year, public, private, proprietary, graduate, HBCU)
- Years of service to the profession (new, seasoned, veteran)
- Type of service provided to the profession (school, lender, agency, etc.)

Ex-officio Committee Members serve on the committee due to their title and responsibility on the Board.

- Treasurer
- Vendor Sponsor Chair
- Membership Chair

Ad Hoc Members/Committees: At the discretion of the Conference Chair and/or the President, the following members/committees maybe added.

- President
- Vice President
- Equity, Inclusion and Global Issues Chair
- Electronic Services Chair
- Site Selection
- Conference Chair-Elect
- Local Arrangements

Refer to the SASFAA Policy and Procedures Manual 11.1.4 for additional guidance

Create a spreadsheet listing all committee members with pertinent contact information and distributed to all committee members.

Responsibilities and Task

The Conference Committee Chair will have Administrator access to the SASFAA website to allow for immediate updates of important conference information listed on the website, and assistance with registration issues.

All committee members are to be active participants in the creation and implementation of the conference. Each state representative shall be assigned specific conference task.

Below is a list of conference committee task and responsibilities. The Conference Chair monitors all task and responsibilities.

SASFAA Conference Committee Tasks and Responsibilities

Concurrent Sessions Liaison

Coordinate overall concurrent session activities, working with all other committee members. Work with AV Liaison, SASFAA Equity, Inclusion and Global Issues Chair, SASFAA Vice President.

Department of Education Liaison (if participating)

Coordinate the involvement of all federal presenters and DOE sessions. Work with Session Liaisons, Electronics Liaison and Moderator Liaison.

Electronics Liaison

Coordinate the AV needs for all general and concurrent sessions. Work with SASFAA Electronic Services Chair for posting conference presentations to the conference website. Work with Hotel Liaison, General Session Liaison, and Concurrent Session Liaison.

Evaluations Liaison

Review prior year evaluations. Develop electronic evaluation process. Work with Conference Chair on evaluation medium and overall programming. Guidebook or similar software is recommended.

General Sessions/Special Guest Liaison

Coordinate content, logistics, etc. for the general sessions. Work with Hotel Liaison, Local Arrangements Liaison (transportation), and SASFAA Equity, Inclusion and Global Issues Chair.

Hotel Liaison *The Site Selection Chair could serve as hotel liaison. (Suggestion)*

Coordinate all arrangements with the hotel in regard to meeting space, setup, meals, hotel AV, reservations for SASFAA board/conference committee/special guests. Work with all committee liaisons.

Local Arrangements Liaison *The host state representative could serve as local arrangement liaison. (Suggestion)*

Coordinate hotel information, local transportation, assist with pre-conference activities, charity, work with host state present on hospitality and commuters' area or booth.

Presenter and Moderators Liaison

Selects and coordinates session moderators. Coordinate with presenter and moderator session materials. Assist with session presenter selection. Work with Sessions Liaisons

Publications & Printing Liaison

Coordinate the printing of the pocket agenda, conference signage, and special invitations. Work with Hotel Liaison, Local Arrangements Liaison, and Session Liaisons.

Publicity/Signage Liaison

Work with the SASFAA Communications and Outreach Chair and Electronic Services Chair on marketing conference information to membership, through SASFAA Nine News, SASFAA website and

social media outlets. Work with Publications Printing Liaison on developing, and printing signage at conference.

Special Events and Entertainment Liaison

Coordinate logistics, theme, decorations, etc. for the conference and conference related activities. Work with Hotel Liaison, and Local Arrangements.

Section 4: Conference Finances

Budget

Budget preparation begins in April/May prior to your year as Conference Chair. Review the previous year(s) budget and expenses. Have available tentative costs from the hotel (meals, AV services, etc.).

Items to include in your budget:

- Travel including travel expenses
 - Committee Chair (Board Meetings, Special Hotel Meetings and Conference)
 - Committee Members (Conference meeting and Conference)
- Hotel Expenses (refer to hotel contract for minimums such as food and beverage, AV, hidden cost like hanging banners)
- Registration Comps
- Hotel Rooms Comps
- Guest Speakers / Keynote Speakers
 - Fees
 - Honorariums
 - Travel
- Printing
 - Conference Bags
 - Pocket Agenda
 - Name Badge Holder
 - Miscellaneous
- Decorations
- Entertainment (If you are scheduling off-site event include transportation)
- Gifts
 - Guest Speakers
 - Conference VIPs
 - Conference Giveaway
 - Committee
- Conference paraphernalia
- Miscellaneous
 - Conference Evaluations (electronic or paper)
 - Office Supplies
 - Other
 - Charity supplies and petty cash

Monitoring Expenses

Refer to SASFAA Policy and Procedure Manual 10.2.2, 10.2.4, 10.6.4, 10.9 for guidance.

All committee members should get approval from the chair prior to creating the expense. Committee members should submit SASFAA Expense forms to the Committee Chair for approval prior to submitting forms to the SASFAA Treasurer.

Credit Card

The Conference Chair will be issued a SASFAA credit card in chair's name. This card is to be used for authorized SASFAA business only. A monthly statement will be mailed to you. The cardholder will complete a monthly Credit Card Expense Form and submit it to the Treasurer for payment. For additional guidance, refer to SASFAA Policy and Procedure Manual 10.7

Contracts

Any contract (e.g. keynote speaker, entertainment, etc.) needing an authorized signature must be signed by the President. A copy of the contracts should be maintained by the Conference Chair in order to submit a Miscellaneous Expense Voucher for payment as well as having possible specific AV or setup needs

For additional financial guidance, refer to the SASFAA Guide to Financial Management.

Section 5 Meetings

SASFAA Board Meeting

The Conference Chair is a non-voting member of the SASFAA Board. The chair is expected to attend and provide a written report and verbal update of your activities to date. The board meetings requiring attendance are generally held

- June Transition Board Meeting
- July/August Executive Board Meeting
- October/Nov Executive Board Meeting
- February Pre-Conference Board Meeting
- June Transition Board Meeting

Refer to SASFAA Policy and Procedure Manual 7.1 for additional guidance.

Committee Meetings

The first conference committee meeting should be in person and will overlap with the first board meeting in July/August, which is typically held at the site hotel. The Site Selection Chair will have arranged this meeting with the President; however, the Conference Chair may need to assist with arrangements.

The travel for committee members should be one day prior to the meeting and end one day after the meeting. (Travel day, Meeting Day, Travel Day). The Conference Chair and Site Selection Chair should work together on meal planning.

Refer to SASFAA Policy and Procedure Manual 10.6.4 for additional guidance.

Suggested items to cover at the first conference committee meeting include but are not limited to. . .

- Committee Travel
- SASFAA Expense Forms
- Conference Theme
- Committee Task and Assignments
- Conference Sessions (concurrent and general)
- Special Events
- Charity
- Guest Speakers
- Giveaways

Regular conference call meeting should be scheduled with the committee. If no local assistance for conference calling is available, work with the Electronic Services Chair for assistance with setting up a conference.

A final in person at the hotel site should be held Friday, afternoon prior to start of the conference. A final review of the conference, tour of facility, and on-site assignments are a part of the meeting.

Refer to SASFAA Policy and Procedure Manual 10.6 for additional guidance.

Hotel Meeting

The Conference Chair should be provided a copy of the hotel contact as soon as the President makes the selection. The Conference Chair should review the contract and make any amendments recommendations to the President and Site Selections Chair.

It is recommended that the President, Conference Chair and Site Selections Chair schedule an in person meeting with the hotel prior to the July/August board meeting. It is important to create a good working relationship with the hotel.

It is recommended that the President, Conference Chair, Site Selections Chair, and Vender/Sponsor Chair, along with key hotel staff meet face to face one or two days prior to the conference.

Section 6 Program

Marketing

Marketing for the conference will begin during prior year's conference. The President-Elect and Conference Chair Elect will man a booth during the conference to include base information about the conference location and giveaways. Suggestion: Provide a means for collecting session topics, presenters, and moderators. A promotional ad should also be included in the Conference Program.

Sessions A "Call for Session" should be sent to the SASFAA membership via, SASFAA Listserv, SASFAA Nine News and SASFAA Social Media three to four weeks prior to the first Conference Committee meeting. This information should be shared with the committee during the planning meeting. Suggestion: When deciding on sessions keep in mind . . .

- Number of Sessions being offered
- Will session need to be repeated
- Category of sessions (*e.g. General, Concurrent, Department of Education, Hands-On, Technology, New Aid Officer's, Personal/Professional Development, Issues & Trends, etc.*)

Pre-Cons/Post Cons: The SASFAA Vice-President generally offers additionally training opportunities for targeted SASFAA members. Work with the Vice-President and hotel for possible pre or post con sessions.

President-Elect Workshop: The SASFAA President-Elect will host workshop prior to the start of the conference. Work with the President-Elect for planning this event.

Speakers

Keynote: Start in July with potential keynote speakers and make arrangements to sign a contract as soon as possible. Work with the President to determine how the conference should open – *Humorous, Inspiring, Timely Information, etc.* The key is to start the conference on a strong note.

General and Concurrent Sessions: Remember the budget when securing speakers. Work with other SASFAA Committee Chairs to cover the cost for a general session speaker. Speakers from the Department of Education and NASFAA are not paid.

Try to obtain speakers within the SASFAA membership. Typically, they are not paid to come and speak; however, special circumstances might allow you to cover some travel or room expense (NOTE: this is not a regular practice).

Presenter: All presenters should receive the presenter guidelines and follow-up with specific information. Items needed early are the session description and AV needs. Follow up with the date, time & location of session. It is recommend that all presenters use the Conference Power-Point template.

Moderators: It is recommended to use unassigned SASFAA members from the SASFAA Volunteer List, as well as vendor / sponsor representatives to severe as session moderators.

Registration: Work with the SASFAA Treasurer and Membership Chair on coordinating registration.

Complimentary Registration: In general registration is complimentary to the President, President, Treasurer, Conference Chair, Membership Chair, and Vendor/Sponsor Chair. In addition, we do not charge registration fees for our General Session speakers, Interregional Visitors, nor the Department of Education personnel.

Refer to the SASFAA Policy and Procedures Manual 10.6 for additional guidance.

Conference Packets:

Conference Packets should be assembled prior to the opening of the Conference. All materials to be placed in the conference packets (including the “At A Glance”/Pocket Program, prior year Business Meeting minutes, Treasurer’s report, local area information, etc.) must be at the hotel no later than Friday prior to the conference.

Name Badges are provided by the Membership Chair.

Ribbons – SASFAA has ribbons name badges for specific groups of individuals, as follows:

- Executive Board
- Conference Committee
- Past SASFAA Presidents
- Vendors (various levels)
- Speakers
- First Time SASFAA Conference Attendees

Printing

Signage: Although the hotel may have electronic boards for signage, generic signs may be used on easels to assist in directing attendees to the correct rooms. Specific signs for Registration, Community Service Project, and Concurrent Session, as well as generic signs where we can place inserts for special events/sessions.

At A Glance / Pocket Program: It is recommended that a printed condensed program be included in the registration packet for conference attendees. The program should include all events dates, times, and locations.

Conference Program/Agenda

The conference program must be made available to all conference attendees. It is recommended to make the program available electronically by posting the final program the SASFAA Conference webpage at least seven (7) days prior to the conference.

Refer to the SASFAA Policy and Procedures Manual 8.1.3 for additional guidance.

Conference Theme

Work with the President to ascertain any ideas for possible conference theme. The location, recent events, anniversary year, personal preference may be taken in to consideration in creating an overall theme. If possible, try to have this tentatively decided by the first conference committee meeting – thereby giving the committee some direction.

Conference Logo

Work with the President to ascertain any ideas for possible conference logo. Design the logo to fit the theme. Keep in mind the visual appeal for web & printing opportunities (program, name badges, conference giveaways, etc.). Work to get out the theme and logo finalized as soon as possible in early fall.

Special Events: Work with the President to send invitations to special events and specific groups.

Specific events are as follows . . .

- President Reception
- Past Presidents (Breakfast or Lunch)

- New Members/1st Time Attendees (Work with Membership Chair)
- Sponsorship Reception (Work with Sponsorship Chair)

Charity

Work with the President and conference committee, with flexibility given to the President in recognition of efforts to recognize charities in all states in our region, to select the Conference Charity. A Charity sub-committee should begin working as soon as possible in the Fall to finalize details, prepare information for the website, and plan/execute the charity event at the conference, to include setup/process of donating as well as designating someone to speak on the charity's behalf. Suggestion: Fund raising ideas used in prior years include, State Basket raffle, 50/50 drawing, Online Giving campaign, SASFAA logo blanket, or shirts.

Conference Paraphernalia

If budget permits, the Conference Chair will work with the President on conference paraphernalia to be given to the Conference Committee, the Executive Board, the Professional Advancement Committee, and select others (e.g. President-elect Trainers, Videographer, Interregional NASFAA visitors, Hotel Staff in Sales/Catering, etc.)

Evaluations

Work with the Conference Chair Elect to determine means for collecting feedback from conference attendees. Be mindful of the use of technology and services such as Guidebook. Also, be aware that some service may have a cost associated.

Section 7 Electronic Services

SASFAA Website

The Conference Chair will work with the Electronic Services Chair to post information to the SASFAA website. The goal is to have the website available by mid-October.

- President's Welcome,
- Conference Registration link (will need to work with the Treasurer
- Link to the hotel for booking sleeping rooms other hotel information
- Tentative Agenda,
- Conference Checklist,
- Local Attractions,
- Pre-Con Information,
- Charity,
- Other Special Events.

Regular updates should be made to the website.

SASFAA Nine News

The Conference Chair will submit articles or reports marketing the conference. It is recommended the first article be posted no later than the December edition

Conference Audio Visual (AV)

The Electronic Service Chair, or designee will coordinate all audio visual needs for the conference. AV needs will be scheduled through the hotel and maybe part of the contract.

AV equipment, such as laptops and video projectors may be solicited from board, committee members, and SASFAA membership who have equipment available for conference. All equipment & cords should be marked for return to the roper person.

Section 8 Copy Rights

The Conference Chair should be knowledgeable of the SASFAA Copyright Policy and Music Usage Policy. Refer to SASFAA Policy and Procedures section 8.2 for additional information.

Section 9 Vendor Sponsor

SASFAA Vendor/Sponsor Chair serves on the Conference Committee as an ex-officio member. The Chair is responsible for coordinating information to and from our Vendors/Sponsors in conjunction with the Conference.

The Vendor/Sponsor Chair will coordinate with our vendors regarding sponsored events. Also, work with the Vendor/Sponsor on any “outside” events. It is important that the Conference Chair is aware of all SASFAA related events at the hotel.

The Conference Chair will need to know all sponsored events for program inclusion as well as to assist in writing the President’s script (to say “Thank You”).

Refer to SASFAA Vendor Sponsor Handbook for additional information.

Section 10 Document Examples and Templates

Attachments