



Policy and Procedure Manual

Southern Association of Student Financial Aid Administrators

Updated May 1, 2023

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Sections

Section 1: Introduction

The Southern Association of Student Financial Aid Administrators (SASFAA) Policy and Procedure Manual (Manual) supplements the Articles of Incorporation and the Association bylaws by providing specific policy guidance and procedures that are required to be used by the members of the Board of Directors hereinafter referred to as the Manual and committee chairs. It provides an overview of the Association's structure, describes the responsibilities of members who hold leadership positions, and provides guidance and reference to be used in the conduct of Association activities.

1.1 Purpose and Scope

The Manual is designed to provide the Board with easy access to essential information about the policies and procedures that govern SASFAA. These policies and procedures are intended to further the mission of the Association, ensure fiscal integrity and support the continued viability of the Association.

A number of additional benefits are expected from the use of the Manual, including a greater understanding of Association responsibilities among members, a consistency of interpretation and processes, and a means of familiarizing those members serving in a leadership position for the first time with their individual responsibilities as well as the overall role of SASFAA.

The Manual is not intended to include a description of every function of the Association nor of every activity conducted by the Association. The Manual is intended to be a living document that will change as necessary to fit the Association's needs.

1.2 How to Use the Manual

All members of the Board and committee chairs are responsible for using the Manual to perform their duties.

The Manual is organized into sections that should assist the user in locating information easily. The Table of Contents lists these sections. In addition, Appendix A and B includes attachments pertaining to items referenced throughout the Manual. Most standard forms are retained on record with the secretary for officer and committee use, as needed. Appendix B contains references to other applicable policies and procedures for SASFAA.

A numerical outline is used as the format, as listed in the Table of Contents. Chapter 1, for example, contains three subsections: 1.1, 1.2, and 1.3.

The Secretary maintains the Manual. The Association has adopted a standard software program (Word), format (Numerical Outline) and type style (Times New Roman) to be used throughout the Manual. All future changes to the Manual must adhere to these standards.

1.3 Updating the Manual

All officers and committee chairs are responsible for identifying areas in need of new or revised policy guidance or procedural change and for recommending appropriate changes. The Board must approve all new policies, procedures, and changes. Upon approval, the Secretary incorporates the changes.

The *SASFAA Policy and Procedure Manual* shall be reviewed by the Board annually to ensure that it continues to further the mission of the Association and its financial integrity. All proposed changes to the Manual must be approved by a majority vote of members present at a meeting of the Board.

After every five years a thorough review of the Manual shall be undertaken to identify areas needing changes. The last full review was in 2019-20, the next full review will take place in 2024-25.

1.4 Compliance

All Board members and representatives to the Board (committee chairs, liaisons, etc.) are responsible for following established policies and procedures.

Section 2: Corporate Structure

SASFEE was established in 1963 with the primary purpose of promoting the professional development of financial aid administrators and others involved in student financial aid programs and assisting in the development and improvement of student aid programs. The specific purposes of SASFEE are delineated in the Association's bylaws.

2.1 Articles of Incorporation

The Association was duly incorporated under the laws of the State of Georgia November 10, 1983, and is organized pursuant to the provision of the Georgia Nonprofit Corporation Code. Appendix B references the location of the full text of the Articles of Incorporation. The corporate office of record and registered agent is Susan Little, 1348 Foster Manning Road, Summerville, GA 30747, (404) 992-0529, Chattooga County.

2.2 Bylaws

Appendix B references the location of the Bylaws.

2.3 Certificates of Exemption

SASFEE has been granted an exemption of sales taxes in the following states covered by the Association.

- Florida
- North Carolina (SASFEE must first pay tax and then apply for refund of amounts paid)
- Tennessee

Committee chairs or officers who hold meetings in this state should present a copy of the appropriate certificate when contracting for or paying for services associated with SASFEE business. Examples of such services include hotel room costs, meals, printing, etc.

The Treasurer maintains a copy of the appropriate certificate of exemption as part of the official records of the Association. A copy of the certificates of exemption is included in Appendix A. Additional information is contained in the SASFEE Guide to Financial Management, which is referenced in Appendix B.

2.4 Association Goals and Objectives

The Association pledges to:

- (1) support professional communications in all areas concerned with the administration of student educational financing programs;
- (2) promote the development of future leaders by actively involving its membership;
- (3) ensure representation of financial aid professionals at all institution types in the region through its membership;
- (4) enhance alliances between and among various sectors of the student financial aid community;
- (5) apprise members of legislative issues affecting the profession, encourage involvement on issues, and advocate positions when reasonable consensus exists;
- (6) help educate members about alternative methods to finance education and/or administer student financial aid programs;
- (7) provide for the profession growth and competencies of members by offering workshops, seminars, meetings and other training opportunities to meet the needs of the membership;
- (8) provide for and ensure the future financial stability of the Association through careful and regular financial planning and evaluation; and
- (9) maintain the bylaws and policies and procedures to ensure they are accurate and complete, in order to further the mission of the Association and ensure its fiscal integrity.

The goals and objectives should be reviewed annually by the Long-Range Planning Committee or a similar body to ensure that the goals and objectives remain current.

Section 3: Corporate Identity and Property

Devices exist that create an identity for the Association. It is important that the Association adhere to standards of use to help ensure that there is consistency in the manner in which the corporate identity is portrayed.

Most properties of the Association are provided to assist in performing the business of the Association. Design and use of these properties are controlled to ensure proper use and to protect the investments of the Association.

3.1 Logo

The logo of the Association is the design of the Association and is to be used only in conjunction with official business matters and publications authorized by the president or

the Board. (See Attachment 3.1 for a sample of the logo). Any unauthorized use of the logo shall be deemed as misrepresentation of the Association and illegal use of Association property.

The logo shall be displayed on all Association stationary and certificates and on other official documents, when practical. The Secretary shall retain the logo.

3.2 Association Colors

The official colors of the Association are white and blue (PMS 282).

The official color shall be used on Association stationary and certificates. For other publications, either the official color or black ink shall be used to reproduce the logo when it is included in the publication.

3.3 Association Properties

3.3.1 Banners

The banner bearing the Association's logo is retained by the Vice President and is displayed at Association meetings. It is the responsibility of the Vice President to transfer the banner to the succeeding Vice President.

3.3.2 Corporate Seal

The Secretary is responsible for housing the corporate seal. The seal is to be used only at the discretion of the president or the Board and only for official Association documents, e.g., certificates, legal documents, resolutions, etc. Impressions of the seal may be made either with or without the use of gold foil. Persons desiring to use the seal must first obtain verbal or written approval from the Board of Directors. The corporate seal bears the following inscription:

Southern Association of Student Financial Aid Administrators, Inc.

Since 1963

It is the responsibility of the secretary to transfer the seal to the successor.

3.3.3 Certificates

Certificates may be given to participants at various events at the discretion of the event chair/coordinator. The certificates for these events are outlined in the guides describing the various events (e.g., Summer Workshop Guide). The designated chair/coordinator of the event will generate these certificates and they do not need to bear the seal of the Association.

Refer to Section 9.2.4 for information on Special Award Certificates.

3.3.4 Meeting Gavel

The gavel is retained by the President of the Association and is used at official business and Board meetings.

It is the responsibility of the president to transfer the gavel to the successor for safekeeping.

3.3.5 Stationery and Supplies

Stationery and supplies are the property of the Association and shall be used only for purposes of conducting Association business, as duly authorized by the Board. Unauthorized use of these properties shall be deemed as misrepresentation and illegal use of Association property.

Persons in possession of Association stationery or supplies shall promptly surrender or destroy such properties at the time the individual leaves office or the term of responsibility to the Association expires, when the stationery or supplies become obsolete or as otherwise directed by the president.

The following represents the standard stationery and supplies maintained by the Association:

- ☐ Electronic stationery listing the names and contact information of all officers of the Board and other persons identified by the President;
- ☐ Name badges displaying the Association's logo;
- ☐ Expense and financial reporting forms used by the Treasurer

3.4 Tangible Assets

Certain tangible assets are the sole property of the Association. A complete record of all assets must be retained in safekeeping. Certain tangible assets are licensed to the Association and usage of these assets bears certain licensing restrictions.

3.4.1 Computers and Software

The Association maintains computers, software, and other electronic equipment for the sole purpose of conducting Association business. Such equipment and software are the property of the Association and are to be used only for Association business.

All software and equipment shall be registered with the appropriate manufacturer(s) to provide the Association with maximum coverage for manufacturer warranties. A listing of Association assets shall be maintained.

The Association shall purchase insurance to cover loss due to theft or damage on all computers and electronic equipment, if applicable.

Persons in possession of this equipment or software shall promptly surrender them when their term of office/responsibility expires or if they otherwise are directed by the president to do so.

3.4.2 Ballot Boxes

The ballot boxes are being stored at Edsouth if needed for future use.

3.5 Archives

SASFAA documents that were housed with the South Carolina Student Loan Corporation in Columbia, South Carolina were scanned into a cd in March 2007. The compact disc resides with the Secretary and is titled, "SASFAA ARCHIVE FILES MARCH 2007". Instructions for accessing the documents on this cd are included in a file contained on the disk.

The March 2007 archived compact disc was created by Document Systems, Inc. The company's contact information is:

Document Systems, Inc
Attention: Marc McQueen
Columbia Operations
Columbia, SC Facility
1925 Laurel Street
Columbia, SC 29201

Website: www.documentsys.com

E-mail: memcqueen@vimagetech.com
info@documentsys.com

Telephone: 803-799-3400

Fax: 803-799-9872

Additionally, documents from the 2006-07/2007-08 and 2008-09/2009-10 SASFAA Secretary are contained on a separate portable storage drive. The content on the portable storage drive was not created by Document Systems, Inc. It is compilation of materials copied by the Secretary for each of the respective years. This portable storage drive will be updated by each Secretary to ensure SASFAA records are contained in an electronic format.

It is the responsibility of the Secretary to ensure that appropriate records and materials are transferred for archive storage.

It is the responsibility of each officer and committee chair to forward items that should be archived (as outlined in Section 12.7) to the Secretary as soon as they are finalized.

Section 4: Organizational Structure

4.1 Executive Board

The Board shall function as the Board of Directors of the Association and is responsible for the management of the business, property, and assets of the Association. The Board shall be vested with all powers possessed by the Association itself. This shall include the power to appoint and remunerate agents and employees, insofar as such delegation of authority is not inconsistent with or repugnant to the laws of the State of Georgia, any other laws, the Articles of Incorporation of the Association and the bylaws. The Board shall consist of the following:

- SASFAA elected officers: President, President-elect, Vice President, Immediate Past President, Secretary, and Treasurer.
- State Presidents: The President, or the designated representatives, of the following state financial aid associations – Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, South Carolina, Tennessee, and Virginia.

SASFAA elected officers and state presidents must be active members of the Association. Elected officers and state presidents will be granted a grace period until September 1 to pay their annual membership dues.

Both the elected officers and state presidents have voting privileges at Board meetings.

The chief executive of a state association may designate a substitute-voting member for Board meetings. The name of the substitute-voting member must be communicated to the SASFAA president who must announce the substitute at the beginning of the meeting. Elected officers cannot appoint or request proxy-voting privileges in their absence during board meetings.

4.2 Organizational Chart

A chart depicting the organizational structure of the Association for the current fiscal year (July 1 through June 30), inclusive of the Board and other positions that typically are assigned responsibilities to perform duties on behalf of the Association is referenced in Appendix C.

4.3 Committees

The President of the Association shall appoint committees as deemed necessary to conduct the business of the Association. Unless otherwise specified by the bylaws of the Association, the President shall designate the chair of each committee.

Committees must be comprised of members of the Association. Members of the committees are selected by the committee chairs. It is recommended that the committee

chair consult with the president regarding committee membership representation. To the extent practical, all sector types and states comprising the SASFAA region should be represented among committees as a whole.

It is the responsibility of current committee chairs to transfer all committee records and files related to the business of the Association to the succeeding chair before the commencement of the new chair's term of service. It is also incumbent on current officers and committee chairs to use the policies and procedures set forth in this Manual and to advise the Board about needed changes.

4.4 Membership

There shall be (4) classes of membership in the Association – Active, Honorary, Associate, and Retired.

1. Active membership in the Association shall be open to individuals who:
 - a. are associated with the administration and support of student financial aid in postsecondary institutions of education, in government offices and agencies, in lending institutions and organizations, and in other private, community or civic organizations or programs; and
 - b. are located in, or who have administrative responsibility in Alabama, Florida, Georgia, Kentucky, Mississippi, North Carolina, South Carolina, Tennessee or Virginia;
 - c. have paid annual dues for the current year

Individuals who meet the membership criteria in Article IV, Section 1(A)(1) of the Bylaws and are employed by a post-secondary institution or agency outside the SASFAA region that has a branch campus within the SASFAA region shall be considered to meet the conditions of Article IV, Section 1 (A)(2).

Individuals who meet the membership criteria in Article IV, Section 1(A)(1) of the Bylaws and are employed by lending institutions or other such organizations located outside the SASFAA region but which do financial aid related business within the SASFAA regions shall be considered to meet the conditions of Article IV, Section 1 (A)(2).

2. Honorary membership shall be presented to persons who have performed outstanding service in the field of support and/or administration of student financial aid and who are voted Honorary membership by the Board *of Directors as defined in Article IX*.

All SASFAA Past Presidents and Distinguished Service recipients who are no longer directly involved in the administration of financial aid shall be automatically granted

Honorary membership. Unless otherwise eligible, individuals nominated for Honorary membership must be approved by a majority vote of the Board.

3. Associate membership shall consist of all member(s) not eligible for Active, Honorary or Retired membership. Associate membership in the Association shall be open to individuals who:
 - a. Have primary job duties and responsibilities that fall in areas other than the administration and support of student financial aid in post-secondary institutions of education, in government offices and agencies, in lending institutions and organizations and in other private, community or civic organizations or programs but for whom financial aid administration is a secondary or related job responsibility, or
 - b. Have primary job duties and responsibilities that include the administration and support of student financial aid in post-secondary institutions of education outside the SASFAA regions, and
 - c. Have paid annual membership dues for the current year.
4. Retired membership shall consist of individuals who:
 - a. Were actively engaged for at least 10 years in the administration of student financial aid or have been approved for this membership category by a majority vote of the Board, and,
 - b. Are no longer employed in the financial aid profession, and
 - c. Are not eligible for Active, Honorary, or Associate membership, and
 - d. Have paid annual membership dues for the current year.

4.4.1 Membership Eligibility

Membership shall be individual rather than institutional and shall not be transferable. Membership dues are non-refundable.

Active membership shall be on an annual basis corresponding to the fiscal year as defined in Article V of these bylaws. Active membership shall terminate at the end of the membership year when a member no longer meets the criteria outlined in Article IV, Section 1(a) of this Article. Associate and Retired membership terminates at the end of the membership year.

Application for Active, Associate and Retired membership shall be made to the Treasurer.

The following items detail the rights of membership in the Association:

- a. All Active, Associate, Honorary and Retired members:
 - Are listed annually on the membership roster, and

- ☐ Are provided with SASFAA communications, and
- ☐ May serve on Association committees.
- b. Active members only:
 - ☐ Are eligible to hold office or to be appointed to a leadership position with the exception that individuals serving in the offices of Vice President, President-Elect, President and Immediate Past President shall be affiliated with a post-secondary institution, and
 - ☐ May vote in the annual election of officers, on Bylaw changes and other items needing membership approval.

Section 5: Duties and Responsibilities of the Board

5.1 General Expectations of Board Members

It is expected that Board members will:

- (1) Attend all Board meetings and stay until the end of the meeting. All Board members unable to attend should notify the president as soon as possible;
- (2) Serve as leaders in the financial aid profession and set an example for other members of the Association and for external constituencies;
- (3) Recognize and uphold all fiduciary responsibility vested in the Board.
- (4) Provide a report at each Board meeting outlining the activities and/or issues of each Board member's area of responsibility. An electronic copy of the report should be provided to the SASFAA Secretary for inclusion in the written minutes.
- (5) Adhere to the policies and procedures adopted by the Association and provide suggestions for change when appropriate.
- (6) Be an active participant in decisions made by the Board on behalf of the members.
- (7) Sign and comply with all critical board documents. Critical board documents are listed below and referenced Appendix C of this manual:
 - a. Confidentiality Acknowledgement
 - b. Conflict of Interest Form
 - c. Standing Rules of Engagement & Protocols.

Additionally,

- (1) Each voting member of the Board shall notify in writing all members of the Board of his or her appointment as a consultant, advisor, council member, representative, agent, officer or trustee of any need analysis system, guarantor, collection agency, lending institution or other provider of financial aid services. This notification must be made within 30 days of the appointment.
- (2) Officers and committee chairs shall pass on to their successors all pertinent records and reports by August 1. In the event of an officer's or committee chair's resignation or removal from office, all records must be submitted to the successor or to the secretary, as appropriate, within 30 days.
- (3) The President of a state association may designate a substitute-voting member for Board meetings. The name of the substitute- voting member must be communicated to the SASFAA President, who must announce the substitution at the beginning of the meeting.
- (4) State Presidents are also expected to report on issues or events occurring in their states and provide information about their states' activities to the Communications and Outreach Chair.
- (5) Committee chairs, liaisons and guests may attend meetings of the Board, enter into discussions if recognized by the president and make presentations, but shall not have voting privileges.

5.1.1 Legal Duties of Board Members

Southern Association of Student Financial Aid Administrators (SASFAA, the Association) officers and board members must meet certain standards of conduct and attention in carrying out their responsibilities to the association. These standards are the duties of care, loyalty, and obedience. These collective duties apply to the entire board and require the active participation of all of its members. The board reviews these duties annually at the transition meeting

The Duty of Care:

The Duty of Care requires that SASFAA board members and officers be fully informed about the Association's activities, participate in decisions, and do so in good faith. Board members and officers must act in a manner they reasonably believe to be in the best interest of the Association and must use the care and judgment of an ordinarily prudent person when making decision as a steward of the organization. SASFAA board members and officers carry out the Duty of Care through:

- Being aware of SASFAA's mission, plans and policies, and being sure they indeed serve the needs of the community that the board members represent.
- Fully participating in board meetings, deliberations, and decisions by attending board meetings and arriving fully prepared.
- Reading, evaluating, and ensuring accuracy of all reports, including minutes, financial, and committee reports.
- Ensuring the Association has sufficient resources to fulfill its mission.
- Using independent and best judgment when making decisions.

The Duty of Loyalty:

The Duty of Loyalty is a standard for faithfulness and requires all SASFAA board members and officers to give undivided allegiance when making decisions affecting the Association. This means that board members must act in the interest of the Association and not in their own interest or the interest of another entity, particularly one in which they have a formal relationship. SASFAA board members and officers carry out the Duty of Loyalty through:

- Recognizing and notifying the president and other board members of any conflict of interest, either formal or informal that may affect independent thought.
- Disclosing by a board member to the rest of the board any information about him/herself that could have an impact on his/her decision making and oversight function.
- Never using information obtained as a board member for personal gain and always acting in the best interests of the organization.
- Completing a Conflict of Interest Form annually.
- Always thinking about and focusing on the priorities of the association and not that of yourself or another organization.

The Duty of Obedience:

The Duty of Obedience requires SASFAA board members and officers to comply with all applicable federal, state, and local laws and to adhere to the Association's Bylaws. Board members exercise their own reasonable judgment concerning how the Association should best meet its mission, and they may not act or speak publicly in a way that is inconsistent with the

mission and goals of the association. SASFAA board members and officers carry out the Duty of Obedience through:

- Thorough knowledge of the Association's regulatory and reporting requirements and documents governing the association and its operations (such as By-Laws and Board Policies and Procedures Manual).
- Representing the association in a favorable light.
- Speaking "with one voice" after a decision has been made, even if the individual board member is in disagreement with the decision.

5.2 President

The President serves as the chief executive officer of the association and presides at all Board and business meetings. In this capacity the president:

- (1) provides leadership and direction to all activities of the Association, the Board and all standing and ad hoc committees;
- (2) represents SASFAA as an observer in the Board meetings of the National Association of Student Financial Aid Administrators, Inc. (NASFAA), serves as an alternate voting member in the absence of the SASFAA Past President if approved by the NASFAA Chair, provides reports of NASFAA activities to the SASFAA Board and publishes reports in the SASFAA Nine News or on the website as appropriate;
- (3) selects all committee chair and liaisons. Works with committee chairs on finalizing committee members;
- (4) serves as ex-officio member of all committees except Nominations & Elections.
- (5) approves expenditures and has authority to pay bills;
- (6) submits a written annual report on the year's activities to Association members by June 30th; and
- (7) represents SASFAA at selected SASFAA affiliated state meetings.
- (8) use the Long-Range Plan and the Governance and Planning Committee's recommendations in establishing the goals and objectives for the year, while adding personal goals that are approved by the Board. The goals should be given to each Board member no later than two weeks prior to the first Board meeting following the transition meeting.
- (9) In coordination with the President-Elect and Past President, conduct an annual evaluation of the Bookkeeper to be presented to the SASFAA Board of Directors.

5.3 President-Elect

The President-elect assists the President and prepares for the term of office. Additional responsibilities of the President-elect include the following:

- (1) represents SASFAA at selected state meetings;
- (2) reviews the Manual and makes recommendations for changes to the Board or the appropriate committee;
- (3) conducts an orientation session at the annual conference for state Presidents-elect;
- (4) advises and counsels the President as needed;
- (5) begins initial planning for the next annual conference and for the promotion of the event;
- (6) selects all groups, taskforce chairs, and committee chairs for the upcoming year. Works with all groups, taskforce chairs, and committee chairs on selecting committee members utilizing volunteers;
- (7) consults with the Board and budget chair in developing future initiatives; and
- (8) performs other duties as requested by the President.
- (9) In coordination with the President and Past President, conduct an annual evaluation of the Bookkeeper to be presented to the SASFAA Board of Directors.

5.4 Vice President

The Vice President is elected for a two-year term and has a leadership role in professional development and training activities for the Association. Included in this role are the following responsibilities:

- (1) plans and coordinates the new aid officers and mid-level workshops, including curriculum development, recruitment of faculty, site selection and advertising the workshop (the workshop guide is referenced in Appendix B);
- (2) coordinates other new aid officer and advanced level seminars and selects instructional faculty and training sites;
- (3) in the absence of the president serves with the powers and performs the duties of the President;
- (4) serves as chair of the Professional Advancement Committee; and
- (5) performs other duties as requested by the president.

5.5 Treasurer

The Treasurer is elected for a two-year term and oversees and manages the Association's financial matters. Additional responsibilities include:

- (1) submits financial reports to the Board at each meeting and the annual business meeting;
- (2) prepares annual year-end financial statements as of June 30;
- (3) arranges, in coordination with the budget and finance chair, for an annual independent financial review of the financial records;
- (4) files IRS form 990 for the fiscal year by the prescribed deadline, currently November 15 and all financial reports in a proper and timely manner;
- (5) sets up master accounts and obtains credit for the Association as appropriate;
- (6) performs other duties as requested by the President; and
- (7) serves as ex-officio member to the Annual Conference Committee, the Budget and Finance Committee, and all other committees associated with professional development training;
- (8) serve as the conduit for the Bookkeeper and the SASFAA Board of Directors;
- (9) in the absence of a Bookkeeper, the Treasurer is responsible for performing all of the duties assigned to that position;
- (10) monitors SASFAA investments and contractual obligations

5.6 Secretary

The Secretary is elected for a two-year term and serves as the scribe for Association meetings and custodian of its records. The Secretary's duties include:

- (1) facilitates meeting arrangements, including lodging, meal functions and meeting rooms for Board meetings;
- (2) records the proceedings of the Board and general business meetings;
- (3) Emails meeting minutes (including board meetings, and annual business meeting minutes) to the Board and/or SASFAA membership at the end of the meeting. The membership and Board will have a two-week time period to respond with corrections to the minutes. Once the two-week time period has elapsed, the meeting minutes shall be considered approved. The Secretary shall post all approved minutes to the SASFAA website;

- (4) e-mails the SASFAA membership prior to the current year's annual business meeting directing them to review the annual business meetings minutes from the prior year before the start of the current business meeting;
- (5) collects board meeting agendas and written reports from all board members approximately two weeks prior to the scheduled meetings, compile the agenda/reports into a single report, and e-mail the compiled agenda/report to the board one week before the meeting for board members to review prior to the meeting;
- (6) serves as chair of the Bylaws Committee, which annually conducts a review and recommends changes to the bylaws to the Board;
- (7) reviews, updates and maintains the Manual;
- (8) prepares and submits meeting minutes with supporting documents and publications, including annual conference programs, special reports, and membership directories to archives;
- (9) creates and distributes the Association's official stationery;
- (10) distributes agendas developed by the President in advance of Board meetings;
- (11) sends appropriate cards and gifts to members and colleagues on behalf of the Association; maintains the seal; and
- (12) performs other duties as requested by the President.

5.7 Immediate Past President

The Immediate Past President assists the president and serves as chair of the nominations and Elections, Awards and the Governance and Planning Committees. In this capacity the Past President:

- (1) serves as parliamentarian to the Board
- (2) presents a slate of candidates in accordance with the election schedule or calendar for President-elect, Secretary, Treasurer and Vice President to the Board;
- (3) solicits nominations for Association awards and presents the awards committee recommendations to the Board;
- (4) performs the duties of the President in the absence of both the President and Vice President;
- (5) serves as a SASFAA voting representative to the Board of Directors of NASFAA.

- (6) conducts an annual review of the strategic long-range plan and presents a written report at the June board meeting; and
- (7) performs other duties as requested by the President.
- (8) In coordination with the President-Elect and President, conduct an annual evaluation of the Bookkeeper to be presented to the SASFAA Board of Directors.

Section 6: Duties and Responsibilities of Committees and Liaisons

The committee chairs work in conjunction with the president to select committee members considering experience, ethnicity, state member representation, sector interests and gender for approval at the first Board meeting of the new fiscal year. The Board may recommend other committee members for approval by the Board during the course of the fiscal year, as appropriate. Each committee and liaison shall:

1. develop goals and objectives in keeping with committee/liaison charges, the bylaws, the mission statement and long-range plan and in consideration of the recommendations of the governance and planning committee;
2. submit articles to the Communications and Outreach Chair and submit monthly updates of activities to the website for publication on the website;
3. prepare and submit reports to the secretary and make reports and submit action items at Board meetings;
4. submit an end-of-year report by April 1 assessing the committee's effectiveness in reaching its goals/objectives and make recommendations for future activities;
5. comply with budget parameters and approve expenditures and requests of reimbursement in accordance with guidelines outlined in the Guide to Financial Management;
6. establish a list serve, as appropriate, to foster electronic communications among members;
7. forward to their successors all pertinent records and reports by August 1 and in the event of a committee chair's resignation or removal from office, all records must be submitted to the successor or to the Association Secretary, as appropriate, within 30 days; and
8. perform other duties as requested by the President and provide copies of correspondence to the President.

6.1 Committees

Committees, comprised of members of the Association, are established to perform specific functions for the organization. Committee chairs and committee members will be granted a grace period until September 1 or at the time of appointment, whichever is later to pay their annual membership dues. These committees also may be structured to provide specific services to the membership of the Association.

Specific committees continue on an ongoing basis as “standing” committees of the Association while other “discretionary” committees may be established to accomplish special functions that may not continue from one administration to the next.

Committee appointments shall be made by the president.

6.1.1 Standing Committees

A standing committee is one that the Board has recognized as essential to the function of the Association and is maintained from one administration to the next. Specific duties and responsibilities of each standing committee are outlined in the following sections of this Manual. Standing committees include the following:

- Awards (Section 6.2)
- Membership (Section 6.11)
- Nominations and Elections (Section 6.13) □ Professional Advancement (Section 6.14)

6.1.2 Discretionary Committees and Liaisons

Discretionary committees and liaisons are those appointments that the Board recognizes as being necessary to fulfill distinct needs of the Association. However, the President has the discretion whether to activate these committees from one administration to the next. The President, with the approval of the Board, may identify additional discretionary committees and liaisons as the needed.

Such committees have the same general responsibilities to the Board and the membership of the Association as standing committees. Specific duties and responsibilities of discretionary committees and liaisons are outlined in the following sections of this Manual.

Discretionary committees and agency liaison generally include the following committees:

- Bylaws (Section 6.4)
- Conference (Section 6.6)

- ☐ Electronic Services (Section 6.5)
- ☐ Budget and Finance (Section 6.3)
- ☐ Governance and Planning (Section 6.7)
- ☐ Legislative Relations (Section 6.8)
- ☐ Long-Range Planning (Section 6.10)
- ☐ Communications and Outreach (Section 6.12)
- ☐ Site Selection (Section 6.15)
- ☐ Business Partners (Section 6.16)
- ☐ Equity, Inclusion and Global Issues Committee (Section 6.19)

6.1.3 Special Ad Hoc Committees

At the discretion of the President and/or the Board, certain ad hoc committees may be established to address special, short-term projects. Special ad hoc committee chairs are appointed by the President and must be approved by the board

6.2 Awards

The members of the committee shall consist of the immediate past state presidents. In the event an immediate past president is not eligible to serve in this capacity, the current state president shall appoint a member to the committee. The immediate past president chairs the committee. The awards committee recommends individuals for both the Distinguished Service and Honorary Membership awards. In this capacity, the committee will:

- (1) solicit nominations for outstanding, significant and meritorious contributions to the advancement of student financial aid;
- (2) make recommendations to the Board; and
- (3) provide an appropriate plaque to be presented to the recipient(s) at the annual conference, including honorary membership when the recipient ceases to meet membership eligibility requirements.

6.3 Budget and Finance

The budget and finance committee develops, oversees and maintains proper fiscal controls and financial management strategies to ensure the fiscal integrity of the Association. To achieve these duties, the budget and finance committee will:

- (1) prepare, in collaboration with the President and the Treasurer, the fiscal budget prior to the first Board meeting of the new year;
- (2) monitor expenditures, analyze cash flow trends, and advise the Board regarding short-term and long-term investments;
- (3) make recommendations annually for changes to the current SASFAA Guide for Financial Management as amended;
- (4) conduct with the Treasurer quarterly reviews of cash balances and expenses and makes appropriate recommendations;
- (5) reconcile and document daily transactions at the annual conference;
- (6) recommend budget adjustments, as appropriate, to stay within budget guidelines;
- (7) will have access to the Association's online financial software through the Chair, who will also maintain electronic copies of the monthly reconciliation statements and investment statements, and have online access to view credit card statements.
- (8) review, from a fiscal liability perspective, all contract proposals and makes recommendations to the president; and
- (9) work with the Treasurer to ensure that all financial reports including tax returns are filed by established deadlines.

6.4 Bylaws

The Bylaws Committee, chaired by the secretary, annually reviews Bylaws governing the Association. The Bylaws Committee recommends necessary changes to the Board.

6.5 Electronic Services

The Electronics Services Committee provides web-based support for the association's mission, vision, initiatives, and operational tasks. The committee chair will coordinate the tasks and services of the committee. The committee composition will follow current long-range plan and should include the rising chair who will be appointed by the President-elect early in the year to allow for training and a seamless transition year to year. In this capacity the committee will:

- (1) provide guidance for the development, maintenance and enhancement of the SASFAA website and ensure continuity of website security through yearly renewal of the website security certificate with the webpage provider.
- (2) encourage development and utilization of cost-efficient, timely means of communication, including the web, list serves and e-mail by the Board, committees and the membership.

- (3) provide Administrator access for website update to the rising chair, Conference Chair, and others, with approval of the President, as deemed appropriate to accomplish tasks associated with SASFAA business or goals and expected outcomes.
- (4) evaluate, on a periodic basis, software options and make recommendations to the Board about the purchase of software that will enhance and facilitate the business of the association, and communication and transmission of data with the Board and committees. Such software applications may include, but are not limited to word processing, database, spreadsheet, presentation and e-mail software.
- (5) assist in the implementation of any long-range plan recommendations concerning technology deemed appropriate by the Board and the President.
- (6) provide an annual report or committee activities to the Governance and Planning committee and the President for inclusion in the annual evaluation of the long range plan and the Association's annual report.
- (7) develop and monitor contingency plans to recover data and/or transfer list serve and website management to other locations.
- (8) maintain groups in relevant formats for various communications as deemed appropriate by the Communications Committee and Executive Board. (Example: electronic mailing list consisting of current SASFAA members)
- (9) assist the Chair of the Nominations and Elections committee with the electronic elections process

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 advancement, 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.

6.7 Governance and Strategic Planning

The Association Governance and Strategic Planning Committee's purpose is to ensure for the long-term success of SASFAA. This is accomplished by:

- 1) Examining the Long-Range Plan Goals and informing the Board of the progress toward meeting the goals. This includes updating the Board throughout the year on successes and opportunities.
- 2) Evaluating each year the Board's goals to ensure they are in line with (or in support of) the Long Range Plan, the P&P, and the By-Laws of the Association.
- 3) The Committee will meet at least once a year to evaluate the Board's progress toward meeting goals and providing a helpful encouraging written report (referred to as the GAP Report) of the evaluation.
- 4) Reviewing the previous year's GAP report before the first Board meeting of the year for recommendations and met goals.
- 5) Writing/updating the Long Range Plan every 5-years.
- 6) Reviewing P&P and By-Laws and making recommendations for changes that meet current best practices, the mission and the vision of the Association.
- 7) Ensuring the Board is following the P&P and By-Laws.
- 8) Assessing the efforts being made to encourage Diversity (Race, gender, sector, etc.) involvement at all levels and making recommendations to assist in fulfilling the efforts.
- 9) Reviewing annually the financial stability of the association.
- 10) Assessing and recommending training opportunities.

- 11) Establishing a committee list serve, if necessary, and provide updates and evaluations of the long-range plan in the SASFAA Nine News and on the website; and make recommendations to the president and Board of Directors.

6.8 Legislative Relations

The Legislative Relations Committee reviews, analyzes, evaluates, and prepares responses on federal regulatory, legislative, and funding issues that may impact the lending community, state agencies, schools, and families. The committee is also responsible for providing information regarding programs, regulations, and funding sources from the 9 state agencies and lending community to the Board and membership. The Committee will:

- (1) advise members and the Board of federal regulatory and legislative issues;
- (2) Appoint committee members representing each member state, working with state presidents, seek to include representation from all sectors and institutional types, as well as representatives from relevant organizations;
- (3) Communicate with state and federal legislative relations chairs;
- (4) Communicate timelines to respond to legislative or regulatory proposals;
- (5) Draft correspondence, prepare position papers, and surveys;
- (6) Assist conference committee in planning interest sessions for the annual conference on legislative or regulatory issues including those affecting state grant or support agencies;
- (7) Use the SASFAA listserve to inform members of legislative and regulatory activities
- (8) Send reports to appropriate SASFAA committees for publication to the membership;
- (9) Maintain contact with national organizations, such as NCHER and the National Association of State Scholarship and Grant and Aid Programs (NASSGAP), to determine the impact of programmatic and funding issues;
- (10) Inform SASFAA members of any federal legislative and/or regulatory issues impacting state grant agencies, state or private non-profit organizations providing financial assistance to students in the SASFAA region

6.9 Lender Liaison

See Section 6.8 Effective 2011-12, position was combined with the Legislative Relations Committee and the Agency Liaison.

6.10 Long-Range Planning

On a five-year cycle, the Governance and Strategic Planning Committee assesses future goals and objectives to ensure continued viability and effectiveness of the Association in fulfilling its mission. Two years prior to the expiration of the current Long-Range Plan, the Governance and Strategic Planning Committee shall work to develop a strategic plan for continued leadership and fiscal integrity. In developing the Long Range Plan the committee will:

- (1) make recommendations for changing or expanding services, activities and roles of the Association;
- (2) make observations regarding Association trends;
- (3) gather relevant data and information from the membership, Board, member state associations and other relevant organizations and associations to identify potential internal or external threats to the Association; and
- (4) review and assess the Association's mission statement for change on a periodic basis.

To ensure continued assessment the governance and strategic planning committee performs an annual review of the long-range plan. The Association's long-range plan was adopted in February 1996, revised in June 2006, and revised again in June 2011. A new long-range plan was adopted in February 2016.

6.11 Membership

The Membership Committee maintains an accurate and up-to-date database listing of members. This database should contain the following information:

- (1) first name, middle initial, last name and title;
- (2) mailing address (street, city, state and zip code);
- (3) institution;
- (4) institution type;
- (5) fax number
- (6) telephone number
- (7) date of initial membership.

To help facilitate these duties, the committee will also:

- (1) work with the treasurer and electronic services chair in developing membership forms and provide input to the conference chair to develop conference forms.
- (2) produce labels and/or electronic spreadsheets of current and previous year members for mailings and reports.
- (3) announce the availability of the online membership form to solicit membership dues no later than July 31.
- (4) assist the treasurer with on-site registration at the annual conference.
- (5) provide a list of conference registrants to conference sponsors upon request, to include: first name, last name, title, institution, street address, city, state, zip, email address, and institution type.
- (6) provide recommendations to the Board regarding membership recruitment activities.
- (7) download the membership list to a personal computer on a periodic basis (twice a year at minimum) and maintain the most recent copy until the next download occurs.
- (8) on June 30 download the membership list to an Excel spreadsheet and send it to the SASFAA Secretary to be archived with that year's SASFAA information.

6.12 Communications and Outreach

The Communication and Outreach Chair shall serve as the primary manager of all official SASFAA communications including emails, social media sites and posts, and the consistent, ongoing production and posting to the SASFAA blog.

Members, committee chairs, sponsors and others who wish to publish to the membership will submit announcements, news releases, articles, regulatory updates, and all other information to the Communications Chair. The chair will coordinate postings and delivery methods as determined by the committee and approved by the Board. Regular surveys of the membership's preference for communication will be conducted and adjustments in delivery methods will be made based on the results.

The committee will evaluate current social media each year and recommend to the President and Executive Board the combination of media to be utilized that year. Content on social media sites will be professional and consistent, and deliver public outreach, encourage association involvement and volunteer opportunities, provide links to relevant online news articles of potential professional benefit and interest, and promote professional development and training opportunities. The Chair will provide Administrator access (social media and blog posting) to others, with approval of the

President, as deemed appropriate to accomplish tasks associated with SASFAA business or goals and expected outcomes.

The name of the SASFAA blog website is ***SASFAA Nine News***. The site is available for posting of committee reports, board meeting highlights, state reports, financial aid news articles, industry announcements, special person recognitions, workshop announcements, conference news and announcements, President's reports and messages, and treasurer's reports. Posting to the SASFAA Nine News may occur at any time without regard to a specified schedule based on the nature or content of the posted item. Production and distribution of items may be posted to the SASFAA Nine News without regard to a specified fiscal year. To produce the SASFAA Nine News, the chair will:

- (1) solicit pertinent articles, reports, and pictures from the SASFAA membership and affiliates;
- (2) edit articles for accuracy, quality and appropriate length and incorporate photographs and graphics when needed;
- (3) review state newsletters, state blog websites, regional blog websites, and NASFAA Today's News for articles appropriate for reprinting and posting to the SASFAA Nine News;
- (4) coordinate SASFAA Nine News advertising with the Business Partner Chair;
- (5) collect SASFAA Nine News sponsorship ads and/or logos from sponsors;
- (6) assist the Business Partner and Budget and Finance chairs as needed to review, project and recommend rates for advertisements, including applicable discounts, on an annual basis;
- (7) use the Communication and Outreach Committee as an editorial board as needed to review the contents of articles as well as the proofing of the contents prior to publication;
- (8) provide for and coordinate with any required announcement schedule that addresses any provisions set forth in the bylaws, such as the distribution of nominations and elections materials;

6.13 Nominations and Elections

The Nominations and Elections Committee, chaired by the Immediate Past President, shall present a slate of candidates who meet the criteria for the offices of President-elect, Secretary, and Vice President, as needed. The committee coordinates and conducts the annual election of officers in accordance with procedures outlined in Section 6.13.9.

6.13.1 Committee Composition

The Nominations and Elections Committee is chaired by the Immediate Past President. Each of the nine past state presidents (who served as president during the preceding year) shall be a member of the Nominations and Elections Committee.

- a. If a past state president does not confirm his/her participation on the Nominations and Elections Committee, the current state president (serving as the voting member on the SASFAA Board of Directors) shall appoint another active member to represent that state on the Nominations and Elections Committee.
- b. A candidate for office shall not serve as a member of the committee. If a committee member should be nominated, that nominee's state president should appoint a substitute to represent that state on the Nominations and Elections Committee.
- c. If a state representative has not confirmed attendance for the fall committee meeting, the chair shall make no less than one email and one telephone attempt to confirm attendance. If contact efforts are unsuccessful, the state president shall be advised. The state president will then take whatever action is deemed appropriate to make sure the state is represented on the committee. If, after these attempts are made, the state is not represented, the chair may proceed under the assumption that the state has waived its privilege of attendance at the committee meeting and in the vote of the selection of candidates.

6.13.2 Solicitation of Candidates

The Nominations and Elections Committee is charged as follows:

- a. solicit nominations from the membership in advance of the fall Nominations and Elections Committee meeting;
- b. solicit candidates via the SASFAA Nine News or email to the entire membership;
- c. create a list of potential candidates from all states and assign committee members to contact them;
- d. enlist the assistance of SASFAA Past Presidents to contact/recommend potential candidates;
- e. require each state representative to solicit nominations from its membership via their listserv;
- f. enlist assistance from SASFAA Board members in soliciting candidates for office;
- g. encourage members of the Nominations and Elections Committee to nominate candidates for office which will be considered by the entire committee for the final slate of candidates;

- h. For the chair of the Nominations and Elections Committee to inform the Board and email the membership a reminder to nominate individuals for office (prior to the slate being finalized) if the Nominations and Elections Committee feels that more qualified candidates are needed;
- i. For the chair of the Nominations and Elections Committee to inform the Board about any potential candidates being vetted by the Nominations and Elections Committee for the final slate. It is the responsibility of any member of the Board to notify the chair of the Nominations and Elections Committee about any concerns regarding a potential candidate.
- j. To secure a dual slate of candidates for each office, to the extent possible

6.13.3 Fall committee meeting

Prior to the fall Board meeting, the Nominations and Elections Committee must formalize the slate of candidates for office for the upcoming year. The committee coordinates and conducts the annual election of officers in accordance with the procedures outlined in Section 6.13.3.

- a. The Chair sets the date and time for the full meeting of the Nominations and Elections Committee. This meeting can be via conference call or via the web;
- b. The Nominations & Elections committee meeting shall be held prior to the fall Board meeting;
- c. The meeting should avoid any conflicts with state association meetings.

6.13.4 Presentation of the slate of candidates to the Board of Directors

The slate of candidates will be vetted by the Nominations and Elections Committee and presented to the Board of Directors during the fall board meeting. The Chair's written report will include the slate of candidates, any rules adopted by the committee, members present at the committee meeting, and recommendations for consideration for future committee meetings. The slate of candidates MUST be presented to the Board before being presented to the entire membership. The Board of Directors may request the Nominations & Elections Committee reconsider the slate as presented.

6.13.5 Presentation of the slate of candidates to the SASFAA membership

Once the final slate of candidates has been accepted by the Board, the slate shall then be announced to the membership via the SASFAA Nine News and the SASFAA listserv. The membership must be notified at least thirty (30) calendar days prior to the opening of electronic voting.

- a. The chair shall receive and submit each candidate's biographical information and other pertinent data to the Electronic Services Chair or Communications and Outreach Chair for the elections webpage;
- b. The suggested format for the candidate's information should be Name, Institution/Organization, Work Experience, Education, Professional Involvement/Activities, and Candidate Statement.

6.13.6 Restrictions on Campaigning

The intent of these guidelines is to provide equal opportunity for all candidates and to eliminate unfair campaigning for SASFAA offices.

- a. Each candidate will be featured in the SASFAA Nine News and/or the SASFAA website prior to the annual conference and opening of the election;
- b. Each candidate will be asked to provide a photograph, a resume, and a statement of candidacy not to exceed 500 words. This statement will not be edited;
- c. No mass solicitation to the SASFAA membership shall be made by or on behalf of a candidate prior to or during the election;
- d. State associations are allowed to solicit in-state support for candidates from that state;
- e. Candidates or their representatives shall not make presentations at individual state meetings other than the state in which the candidate is currently employed.

6.13.7 Nominations from the floor

In accordance with Robert's Rules of Order, newly revised qualified, active members have the opportunity to submit any final nominations for candidates for office.

This process serves as "nominations from the floor."

- a. The SASFAA President must call for nominations from the floor from the membership no later than thirty (30) calendar days prior to the start of the annual business meeting;
- b. Nominations from the floor shall end no later than twenty (20) calendar days prior to the start of the annual business meeting, at which time the SASFAA President will notify the chair of the Nominations and Elections Committee
- c. Any new candidates must submit required information to the committee chair within five (5) calendar days prior to the opening of electronic voting (see section 6.13.5 and 6.13.6).

6.13.8 Election, Verification of Election, and Announcement of Election Results

The Immediate Past President will present the slate of candidates at the SASFAA Board of Directors fall board meeting on behalf of the Nominations and Elections Committee. The membership must be notified at least thirty (30) calendar days prior to the opening of electronic voting.

The general election shall begin ten (10) calendar days prior to the initial business meeting and close at 3 pm (local time) on the last full day of the conference. Write-in candidates may be allowed. The slate of candidates will be presented during the opening session. Each candidate is then introduced.

SASFAA active members will be provided an opportunity to vote once membership status has been verified. Each paid active member will have access to an electronic ballot containing the names of the candidates running for office. The Nominations and Elections chair shall work closely with the Electronic Services chair on the elections process.

The Nominations and Elections Committee will verify the election results. The Secretary will attend the election results verification except in the event that the Secretary is on the ballot or is otherwise unavailable. If that occurs, the President will designate a substitute.

Once the result is verified, the chair of the Nominations and Elections Committee will notify the President as well as each of the candidates. The chair of the Nominations and Elections Committee will report the results of the election at the business session following the completion of voting. The President will state the results of each office and declare the candidates duly elected.

6.13.9 Absentee Ballot Process

Only paid active members may vote. An electronic ballot shall be made available to each paid active member ten (10) calendar days prior to the opening business meeting of the annual conference.

6.13.10 Special Elections

- a. A special election shall be called by the Board in the event of a vacancy in the office of president-elect.
- b. In the event a vacancy occurs in the office of the President-elect within sixty (60) days prior to the annual business meeting, the election will be held during the annual meeting;
- c. The nominations and elections committee shall solicit candidates, finalize the slate, present the slate to the Board, and announce the slate to the membership within thirty (30) calendar days of the beginning of the special election.
- d. Each paid active member will receive an electronic ballot.
- e. The election results shall be verified by the nominations and elections chair and the Secretary. If the Secretary is on the ballot, the election results shall be verified by the Nominations and Elections Chair and the Electronic Services Chair.
- f. Within ten (10) calendar days following the balloting deadline, the chair of the nominations and elections committee shall notify the President and the Board of the results of any special election before notifying the membership.

6.13.11 Run-Offs

In the event that a candidate does not receive a majority of the votes cast for that office, there will be a run-off election. Electronic balloting shall take place as soon as practical following the determination that a run-off election is necessary. Run-off electronic voting will be available for ten (10) calendar days once an access date has been determined.

The Nominations and Elections chair, along with the secretary, will verify the results of the run-off election. If the Secretary is on the ballot, the election results shall be verified by the nominations and elections chair and the electronic services chair.

The Nominations and Elections chair shall notify the Board of the run-off election results before notifying the membership.

6.13.12 Vacancies on the Executive Board

In the event that a vacancy occurs in one of the Executive Board positions, SASFAA will do the following to ensure Board Continuity and success for our organization. If vacancy is due to loss of employment see section 6.13.13

President - A vacancy in the office of the President will be filled by the most recent Past-President of the Association eligible and willing to serve on the Executive Board and approved by a simple majority of the voting members of the Board.

President-Elect - The office of President-Elect shall be filled by a vote of the membership through a special election. (See section 6.13.10)

Immediate Past President - A vacancy in the office of the Past-President will be filled by the most recent Past-President of the Association eligible and willing to serve on the Executive Board.

Vice President, Secretary, and Treasurer Vacancies - shall be filled to complete the term as recommended by the President and approved by a simple majority of the voting members of the Board until the next regular election of officers.

6.13.13 Vacancies Due to Loss of Employment

When an elected Vice President, President-elect, President, or Immediate Past President is no longer employed with a post-secondary institution in the SASFAA Region, or if the Secretary or Treasurer is no longer considered having Active Membership designation, the officer shall immediately notify the Board of Directors. Upon notification the Board must grant, if the elected officer requests, a period of no more than 30 days from the last official day of employment for the officer to find eligible employment within the SASFAA Region. If the 30-day period extends beyond July 1 and ends without proof of employment, the board will proceed with the provisions of 6.13.10, 6.13.12, and/or 6.13.13, as applicable.

- In the case of the President, the Vice President will assume all duties of the President for the 30-day period. If the President finds eligible employment within 30 days and submits proof of employment such as an official offer of employment from the Human Resources office of the college or university, the officer can resume the duties of the President. If the 30-day period expires without documented eligible employment, the Board must follow 6.13.12.

- In the case of Vice-President, Treasurer, or Secretary, an eligible member appointed by the President and approved by a simple majority of the voting members of the Board will assume the duties for the 30-day period. If the officer finds eligible employment within 30 days and submits proof of employment from the Human Resources office of the college or university, the officer can resume duties. If the 30-day period expires without eligible documented employment, the Board must follow 6.13.12.

6.13.14 Record of Members Voting

A record of the total votes cast in general and special elections and the number of eligible voters is included in Section 12.6

6.14 Professional Advancement

The vice president serves as chair of the professional development committee. The committee plans, develops and conducts training activities that contribute to the competency and professional advancement of financial aid professionals. To accomplish its goals, the committee will:

- (1) research and study developments and trends in the financial aid field to make recommendations concerning professional development needs to the Board;
- (2) develop materials in coordination with the Business Partner Chair, obtain sponsorship and conduct training and professional advancement programs to meet the needs of the membership;
- (3) identify locations and develop schedules for training activities;
- (4) construct a preliminary budget proposal with assistance from the budget and finance chair; and
- (5) coordinate a summer workshop for new aid administrators.

6.14.1 Guidelines to Select Faculty

- a. announce the faculty openings in the SASFAA Nine News or similar membership-wide communication.
- b. solicit recommendations for faculty from the membership.
- c. faculty members must be financial aid administrators who have been employed in the student financial aid profession for at least three (3) years, with preference given to those administrators with greater experience.

- d. faculty cannot serve more than two (2) consecutive years except with the approval of the Board.
- e. faculty must be active members of SASFAA.
- f. faculty selection criteria shall include state, type of institution or agency where employed, minority representation, teaching ability and professional attitude. Competency, professionalism and teaching ability shall be determining factors when selecting faculty.
- g. the vice president, in consultation with the president, will select the faculty. Recommendations will be solicited from the Professional Advancement Committee.

6.14.2 SASFAA NAOW Scholarship

To encourage new members to pursue Professional Advancement opportunities and to enhance success within the financial aid profession, the Southern Association of Student Financial Aid Administrators shall provide a Professional Advancement Scholarship. The SASFAA Professional Advancement Scholarship will cover the cost of registration for two (2) participants to attend the SASFAA New Aid Officer Workshop.

To be eligible for the SASFAA Professional Advancement Scholarship, you must:

- Be a current SASFAA member who has not previously attended the SASFAA workshop
- Have five (5) years or less financial aid experience
- Preference may be given to a past SASFAA event attendee
- Complete the application
- Submit an original statement with the application. The statement should be at least one typed page in length on the following topic: Discuss the value and importance of student aid and how it relates to your choice of the Financial Aid profession.
- Submit a current resume and a letter of recommendation from the Financial Aid Director at your institution.

The recipient is encouraged to attend the SASFAA Annual Conference. Recipients will be announced to the SASFAA membership during the Annual Conference.

Applications must be submitted to the SASFAA Professional Advancement

Committee no later than January 31, 20xx. The SASFAA Professional Advancement Scholarship Committee will review applications and select a recipient to be announced at the Annual Conference. Since the scholarship will cover the cost of registration only, the recipient's school must be willing and able to cover any remaining costs associated with the workshop (travel, etc.).

6.15 Site Selection

The Site Selection Committee evaluates and recommends locations and hotels for future annual conferences, Board meetings and other meetings as may be requested by the President, other officers or committee chairs. Checklists for the meetings are referenced in Appendix B of the manual. The committee will:

- (1) provide site selection guidelines to board at each transition meeting held in June.
- (2) assemble a site selection committee, which should consist of a representative from each state. Solicit from each committee member; site suggestions for upcoming meeting that meet the facility requirements.
- (3) visit viable sites and evaluate them using the SASFAAA site facility guidelines and hotel checklist for additional information pertaining to site selection procedures and facility guidelines, respectively. The secretary retains the guidelines and hotel checklist.
- (4) provide to the Board a site report with a recommendation from the committee and tentative contract for review of a future site.
- (5) work to secure final contracts for the president's signature.
- (6) assist board members in the selection of any future sites and identify potential meeting locations as requested.
- (7) works with hotel contact to make arrangements for board meetings, room arrangements, and identify meal sites for the group. Respectively works closely with conference chair in preparation of the annual even to ensure meeting rooms are accurate as per the signed contract.

6.15.1 Conference Site Selection Guidelines

Recommendations for conference site locations should be provided by the state representative on the site selection committee. The facility must have the following minimum physical capabilities:

- a. The annual conference site should have at least 40,000 square feet of meeting space. Have at least 350 guest rooms available at peak. If an overflow hotel is necessary, have the contract negotiated by the host hotel (this ensures attrition is confined to one location);

- b. Have up to 7 breakout rooms available for concurrent sessions and 9 for state meetings. Each breakout room should accommodate 50 to 60 people in classroom style;
- c. have banquet facilities for 500 people;
- d. have theater style seating for 500 people for a general session; and
- e. have display space for 35 Sponsorship booths with 8 feet x 10 feet and space for each booth.

6.16 Business Partner

A potential Business Partner is a company or organization whose activities either supports or is closely related to those of the financial aid community. A Business Partner provides resources to be used by SASFAA in accordance with the purposes of the Association. Business Partners may display their products and services at the annual conference for the purpose of soliciting business.

All sponsored activities must be coordinated through the Business Partner Chair.

The Business Partner committee conducts all solicitations for advertising, Sponsor or space, and direct or indirect sponsorship of training events and activities, and selected publications of the Association. As part of the solicitation, the committee will:

- (1) develop a list of Prospective Business Partners including contact names, email addresses and phone numbers;
- (2) identify activities and events for sponsorship opportunities including SASFAA Nine News and directory advertisements, the annual conference, the New Aid Officers' Workshop, other training events and Board meetings;
- (3) prepare and email solicitations of sponsorship opportunities to potential Business Partners;
- (4) serve as the liaison to the conference committee for sponsorship needs and effective use of Sponsor or spaces;
- (5) publicly recognize the contributions of all sponsors unless an individual Business Partner chooses to opt out of said recognition;
- (6) review and recommend, with assistance from the budget and finance chair, the standard advertising rates as well as any discounts offered to Business Partners;

- (7) review the policies affecting sponsorship and make recommendations when appropriate;
- (8) contract with a drayage company and design a booth floor plan layout for the designated area;
- (9) email special instructions regarding booth space, conference registration, shipping information and storage of materials to Business Partners in advance of the conference; and
- (10) coordinate all Business Partner activities and benefits.

6.16.1 Sponsorship of SASFAA Conferences

Prospective Business Partners must agree to the rules and procedures outlined below. A prospective business partner who does not agree to these rules and procedures will not be permitted to utilize a booth space. A business partner who violates any of these rules must promptly cease any such action, and, at the discretion of SASFAA, may be required to remove his or her booth. The conference chair will attempt, provided adequate space is available, to ensure that conference breaks and/or continental breakfasts will be held in the sponsorship area.

Sponsors must agree to abide by the following rules and procedures in conjunction with the Annual Conference:

- ☐ Sponsors are expected not to organize, sponsor or conduct any social activities directed towards Annual Conference attendees, SASFAA leadership personnel and/or workshop/training activity participants during planned conference sessions/meals.
- ☐ Sponsors may organize, sponsor or conduct non-social events, such as focus, advisory or user groups. Only non-alcoholic beverages and light snacks may be served. Those sponsors will work in conjunction with the SASFAA Sponsorship Chair to arrange accommodations with the conference hotel for such events that occur within the scope of the conference dates.
- ☐ Gifts or giveaways must be of nominal value (i.e. less than \$10 fair market value). All prize drawings, including scholarships, are prohibited. Sponsors may not offer conference participants the opportunity to sign up for or enroll in any contests or to receive gifts or giveaways at a later time in excess of the stated nominal value.

- Sponsors may sell their products and services; however, such sales may include only products and services that are normally marketed by the sponsor.
 - All representatives of sponsors must register for the conference even if they are the designated complimentary registrant(s). Those who are not designated comp registrants must pay conference registration fees in order to attend conference activities and be present in their booth area.
- a. SASFAA Sponsorship Options – refer to appendix D.
 - b. SASFAA Training Activities and Advertising Opportunities

Please send digital ad copy and web link to the Communications and Outreach Chair.

6.16.2 Additional Sponsorship Policies

- a. All Business Partners may purchase mailing labels of SASFAA members at cost. Interested Business Partners should be directed to contact the membership chair.
- b. All s Business Partners activities must be conducted through the Sponsorship Chair.
- c. Refunds of Business Partner fees may be considered by written request to the SASFAA Sponsorship Chair at least sixty calendar days prior to the event. Requests for a refund will be reviewed and voted upon by the President, Budget & Finance Chair, and Sponsor Chair. Approved refunds will be made according to the original method of payment (i.e., by check for payments made by check; by credit to account for credit card payments).

6.19 Equity, Inclusion, and Global Issues

The Equity, Inclusion, and Global Issues Committee will pursue the multifarious focuses of enhancing the inclusivity of its membership to reflect the demographics of the student population it serves; will serve as the diversity subject matter leader and nexus for other SASFAA committees, and member state committees with similar focuses, and will pursue these goals to ensure the best inclusive financial aid practices.

- (1) Provide recommendations to the Conference Committee for pertinent subject matter and training for conferences regarding diversity. Provide pertinent information via the SASFAA website, e-mail, and SASFAA Nine News regarding multicultural matters.

- (2) Provide subject matter expertise for other standing SASFAA committees on maintaining and building demographic inclusiveness internally, and cross-cultural outreach externally.
- (3) Serve as a depository of activities and best practices of SASFAA member states that serve to expedite the graduation of, but not limited to, minority students, first generation students, adult students, disabled students, economically disadvantaged students and veterans.

Identify and build relationships with external organizations that are focused on underserved populations to share SASFAA's financial aid core competencies.

Section 7: Meetings

SASFAA conducts meetings, as it deems necessary, to support the purposes of the Association. Meetings shall be conducted in accordance with the most recent edition of Robert's Rules of Order, Newly Revised.

7.1 Board

At least one meeting of the Board shall be held each year between July 1 and June 30 inclusive. Customarily, four meetings of the Board are conducted each fiscal year.

- (1) An initial meeting may be held in late summer or early fall.
- (2) A late fall meeting may be held generally at the site of the coming annual conference.
- (3) A meeting may be held in conjunction with the annual conference.
- (4) A final, transitional Board meeting may be held in the late spring or early summer.

Board meetings are held at the call of the president or by a petition of four or more members of the Board. The President of the Association shall preside at Board meetings. In an effort to allow voting members to prepare adequately for meetings, topics being brought before the board for a vote will be sent to voting members at least one week prior when possible.

The President of a state association may designate a substitute-voting member for Board meetings. The name of the substitute voting member must be communicated to the SASFAA president who must announce the substitution at the beginning of the meeting.

Normally, committee chairs and liaisons are included in Board meetings. Meetings are public and open to the membership. Other individuals may be invited subject to approval of the president.

7.1.1 E-Meetings of the SASFAA Executive Committee

- a. If the President wishes to call a meeting, he/she may do so without the need for a motion and a second. If another member of the Board wishes to call a meeting a motion to do shall be submitted to the President. This motion requires a second for the meeting to be held.
- b. Notice of an e-meeting will be sent by the President to the Board (and others on the board, when appropriate), a minimum of 24 hours prior to the opening of the meeting, telling the time and day the meeting will be Called to Order, as well as restating the motion and fact that it has been seconded.
- c. Once the e-meeting has been Called to Order and a Call for Discussion is made, members of the Board will “reply all” indicating their presence and offering any discussion.
- d. When the majority of members of the Board have indicated their presence and offered discussion, or when 48 hours has elapsed from the Call to Order (whichever is earlier), the Chair will declare a quorum and call for the vote.
- e. Members of the Board will “reply all” with their vote within 24 hours of the call for the vote.
- f. After 24 hours from the call to vote, the Chair will declare the motion passed or failed and adjourn the meeting.
- g. The Secretary will preserve all emails stating presence, votes, and disposition, and file same with the original copy of the minutes of the called meeting.

7.1.2 Conference Call Meetings of the SASFAA Executive Committee

- a. If the President wishes to call a meeting, he/she may do so without the need for a motion and a second. If another member of the Executive Committee wishes to call a meeting a motion to do shall be submitted to the President. This motion requires a second for the meeting to be held.
- b. Notice of a conference call meeting will be sent via email by the President to the Executive Committee (and others on the Board when appropriate) a minimum of 24 hours prior to the opening of the meeting, telling the time and day the meeting will be Called to Order, dial-in information, as well as restating the motion and the fact that it has been seconded.

- c. All members of the Executive Committee will “reply” indicating their receipt of the meeting call.
- d. The Chair will initiate (host) the conference call and Call the meeting to Order.
- e. Meeting proceeds in the same manner as a face-to-face meeting, with the exception of a Roll Call vote in all instances.

7.2 Annual Business Meeting

The Association shall have an annual meeting. The agenda shall include the election of officers and the presentation of reports. A notice of the meeting shall be announced to all members at least thirty (30) days in advance of the meeting. The annual business meeting is conducted during the annual conference.

7.3 Committee Meetings

Unless otherwise directed by the President of the Association, committees may meet for the sole purpose of conducting Association business. The committee chair and the president, in accordance with the approved budget of the committee, shall establish the meeting location(s) and number of meetings. The committee chair or a designee shall preside. The president serves as an ex- officio member on all committees except the Nominations & Elections Committee.

7.4 State Association Meetings

The SASFAA President or a designee attends at least one state meeting of each of the nine (9) member states. The state association normally provides complimentary registration, waives meeting fees, and sets aside time on the agenda to allow the SASFAA President or a designee to address the members of the state association. Eligible expenses incurred by the SASFAA President or designees are borne by SASFAA.

7.5 NASFAA Board of Directors Meetings

The SASFAA immediate past president shall serve as a member of the NASFAA Board of Directors. The President attends as an observer. The length of these terms shall be one year and shall coincide with the fiscal year of NASFAA. In the absence or disqualification of the SASFAA Immediate Past President to serve as a member of the NASFAA Board of Directors, the President, if eligible, shall serve as the SASFAA representative to the NASFAA Board of Directors.

SASFAA shall cover travel expenses for the President or designee to attend NASFAA Board of Directors meetings. Reimbursement shall be at a rate consistent with the SASFAA policy for travel reimbursements.

As a voting member of the NASFAA Board, NASFAA shall cover travel expenses for the immediate past president (or designee) to attend NASFAA Board of Directors meetings not held in conjunction with the NASFAA annual conference (see 10.6.4 Travel to NASFAA).

Section 8: Communications

8.1 Editorial and Publication Standards

8.1.1 Communications and Outreach

Social media outlets have revolutionized how people communicate and receive news. The SASFAA Nine News is a blog website established for the primary purpose of providing a vehicle to disseminate information in an efficient, timely manner to the financial aid community. The SASFAA Nine News should include news of interest to student aid administrators including professional development information and events pertaining to aid administrators in the SASFAA region.

The Communication and Outreach Chair shall be appointed by the SASFAA President and approved by the Board. A Communication and Outreach Committee shall be formed each year to assist the coordinator in reviewing, editing, and proofing the content of submissions.

Persons submitting material for publication to the SASFAA Nine News are discouraged from including articles that promote goods or services from a Business Partner Chair. Such promotional materials should be submitted for publication after establishing a paid sponsorship package with the Business Partner Chair.

The exception to this policy would be articles promoting goods or services offered through the state associations in the SASFAA region, or other state, regional or national associations representing student financial aid interests.

Additional information submitted for posting to the SASFAA Nine News may include, but not be limited to, the following:

- ☐ Committee reports,
- ☐ board meeting highlights,
- ☐ state reports,

- financial aid news articles,

An individual may register with the SASFAA Nine News to receive an email notification following the posting of an item to the website.

SASFAA Executive Board members should submit timely articles or reports that coincide with the work of their committee/office. Following such a format would require each board member to write only one or two articles a year. However, any SASFAA Executive Board member may submit an article or report at any time.

The SASFAA Nine News should allow for a regular, steady stream of news coming from the SASFAA leadership subject to the diligent adherence by the SASFAA Executive Board members to the reporting schedule below. a. Operational management of the SASFAA Nine News:

- The Communication and Outreach Chair, the Electronic Services Chair and the current SASFAA President should be authorized to post articles, reports and announcements to the SASFAA Nine News. The current SASFAA President may designate other persons as needed with the authority to post to the SASFAA Nine News.
- Any person may submit an article to the Communication and Outreach Chair or the Electronic Services Chair or the current SASFAA President for review. If the article is approved for posting to the SASFAA Nine News, the article will be posted by the authorized person for the good of the association.
- The SASFAA Listserv will remain available to all current dues-paying SASFAA members for delivery of news of importance to the SASFAA membership.
- Contributors to the SASFAA Nine News should refrain from submitting to the Communication and Outreach Chair unsolicited material that promotes goods or services from a Business Partner Chair. Such articles will not be posted to the SASFAA Nine News until a paid business partner package has been approved by the Business Partner Chair. Such approved articles will be noted as a paid, promotional item.
- Registration to receive notice of updates to the SASFAA Nine News shall not be restricted to SASFAA Members.
- The Communications and Outreach Chair should monitor the report submissions of SASFAA Executive Board members to ensure that

board members are posting periodic reports according to a schedule approved by the SASFAA Executive Board.

- All of the following are acceptable for posting to the SASFAA Nine News: Committee Reports, Board Meeting Highlights, State Reports, Financial Aid News Articles, President's Report and Message, Treasurer's Report.
- Photos may be included SASFAA Nine News in reports.
- The Communication and Outreach Chair should continue to function as a "monitor" of industry events and announcements to ensure timely postings of newsworthy submissions to the SASFAA membership via the SASFAA Nine News and/or the SASFAA List-serv. Any person may submit industry news and announcements at any time to the Communication and Outreach Chair to ensure the SASFAA membership is notified of such news.
- The Business Partner Chair will approve sponsorship packages that may include terms and conditions for advertising frequency on the SASFAA Nine News.
- The Communication and Outreach Chair should send the SASFAA board and committee chairs reminders of upcoming report due dates for their scheduled SASFAA Nine News submission.
- The Communication and Outreach Chair should assist the SASFAA Nominations and Elections Committee in notifying the membership of candidates running for SASFAA elective office by posting statements of candidacy and dates for electronic voting.
- The SASFAA Nine News will not accept paid advertising of business opportunities, job openings, or other employment-related information to the SASFAA Nine News. Job postings and employment opportunities should be disseminated through the SASFAA List-serv and not through the SASFAA Nine News.
- The SASFAA Executive Board is composed of nine (9) State Presidents, six (6) elected officers, and nine (9) committees (excluding Professional Advancement which is handled by the VP, By-Laws which is handled by the Secretary, and Governance and Planning which is handled by the Past President). There is no required number of reports that each member of the SASFAA Executive Board should submit for posting to the SASFAA Nine News website. However, each member of the board should submit a sufficient number of

reports to keep the SASFAA membership informed of the ongoing work of their committee or activities in their respective state. The following timetable is a guideline for report submissions:

- August – President, Membership
- September – Site Selection, Electronic Services, Alabama
- October – Legislative Relations, Equity, Inclusion and Global Issues, Florida
- November – Past President, President Elect, Secretary, Georgia
- December – Conference, Sponsorship Chair Sponsor
- January – Past President, Conference, Secretary
- February – Past President, Conference, Secretary, Kentucky
- March – Communications & Outreach, Sponsorship Chair Sponsor, Mississippi
- April – Vice President, Treasurer, North Carolina May - Vice President, President Elect, South Carolina June – Vice President, Tennessee
- July – Budget & Finance, Virginia

8.1.2 Membership Directory

The membership directory is maintained on the SASFAA website.

8.1.3 Annual Conference Program

The annual conference program will be distributed to each person who attends the annual conference and should include the following information: a. letter from the President;

- b. letter from the Conference Chair;
- c. names of members of the current elected officers, state association presidents, committee chairs, liaisons, members of the conference committee, and members of the local arrangements committee;
- d. daily schedule of sessions, events and activities;
- e. brief description of each of the sessions, events and activities;
- f. names and titles of speakers, moderators and presenters;

- g. locations of sessions, events and activities;
- h. diagrams showing the locations of the sessions, events and activities;
- i. brief biographical sketches of persons providing major addresses or presentations;
- j. announcement of the dates and location of the subsequent year's conference.

8.2 Copyright Policy

Copyright policies are designed to protect the work of the Association and to ensure that users give proper credit to its authors.

8.2.1 General Copyright Policy

All documents written and published by SASFAA are considered to be copyrighted. It is not necessary to register these publications with the copyright office for them to be copyrighted. However, the Board may determine that certain publications be formally registered through the Copyright Office. In these cases, it is the responsibility of the secretary to register such publications with the U.S. Copyright Office in Washington, DC.

All SASFAA publications must contain a copyright statement that includes the publication date and the following statement:

Copyright, SASFAA, Inc. [date]

Instructions and sample forms for this purpose may be obtained from the Register of Copyrights. The materials and completed forms are to be mailed to:

Register of Copyrights
Copyright Office
Library of Congress
Washington, DC 20559-6000

8.2.2 Music Usage Policy

Copyright laws require music users to get permission from songwriters and composers who can charge a fee before their music is played publicly. This fee allows the artists and others to continue to create music. Public performance and the playing of recorded, copyrighted music requires permission from copyright owners or their licensing agent(s) to prevent

SASFAA from infringing on anyone's rights—risking lawsuit. This even includes the singing of 'Happy Birthday' that may occur from time to time—as that song is copyrighted

To legally cover the Association from copyright infringements and liabilities for the use of live or recorded music, the Treasurer, on behalf of the Association, will submit event/attendee reports and fees as required by the American Society of Composers, Authors, and Publishers (ASCAP) and Broadcast Music, Inc. (BMI). The coverage from both companies is required as each company represents different copyright holders (song writers, artists, producers, etc.).

Fees and Forms:

ASCAP: If the Association's events reach no more than 1,500 attendees (duplicated), the annual fee is around \$125. Should the number reach 1,501, the fee increases to over \$400.

BMI: The report for all events in the prior calendar year is filed in January. After receiving the report, BMI will issue an invoice for all events in the prior calendar year. BMI's fee is a minimum of \$155.00. The cost increases on a 'per attendee' basis. In total, it's generally around \$200.00 annually.

More specific information and/or verbiage from agreements from ASCAP or BMI can be obtained by using the contact information below.

ASCAP: 800-505-4052 <https://www.ascap.com/music-users>

BMI: 888-689-5264
https://www.bmi.com/licensing/entry/meetings_conventions_trade_shows_and_expositions

8.3 Electronic Communications

SASFAA utilizes various forms of communications to report information, programs, and services to the membership and its affiliated institutions, agencies, and constituencies.

8.3.1 Listserv

The primary purpose of the SASFAA Listserv is to facilitate communication by and between SASFAA members regarding topics related to the administration of student financial aid. When communicating through the Listserv, ethical behavior should be observed at all times, and no behavior should take place over the Listserv that would be considered inappropriate for a face-to-face meeting. Failure to adhere to this standard of conduct may result in loss of access to the Listserv or more severe action, depending on the circumstances.

The SASFAA Listserv is not to be used to advertise, market, or to otherwise promote products or services. For advertising and other marketing opportunities, please follow the Business Partner link on www.SASFAA.org.

The SASFAA Listserv may be used for announcements of job changes, but such announcements must be informational only (e.g. new company, title, new phone/fax number(s), new e-mail address) and should not include any additional information, promotional or otherwise about the hiring entity.

The use of the SASFAA Listserv for announcement of employment opportunities for financial aid professionals is permitted. Such postings should be informational only, and should not include promotional information about the institution or company.

Any Listserv communication that could lead to the unnecessary congestion of the network or that might otherwise interfere with the work of others is not permitted. Examples of such communications include virus warnings, email scam warnings, and “chain” letters.

Exceptions to this policy can only be approved by the SASFAA Board.

The Board and committee chairs shall use this type of communication to provide information to Board members and other committee chairs included on the list serve. The chair of the electronic services committee maintains the list serve. The ongoing maintenance of this list serve should have as much continuity as possible and movement of the responsibility should be kept to a minimum. There should be a backup person assigned to assist or to assume responsibility for the maintenance of the list.

8.3.2 Website

SASFAA shall maintain a Web site to provide informational materials pertaining to the Association such as its programs, activities, services, meetings, workshops, and conferences.

Content should reflect the Association’s mission and goals. The useful life span of the content should be a maximum of two years and older materials should be archived with the ability to retrieve them as needed.

8.3.3 SASFAA Nine News

The SASFAA Nine News is a blog website established for the primary purpose of providing a vehicle to disseminate information in an efficient, timely manner to the financial aid community. The Communication and Outreach Chair shall serve as the primary manager of the consistent, ongoing

production and posting of submissions to the SASFAA Nine News website. The site is available for posting of committee reports, board meeting highlights, state reports, financial aid news articles, industry announcements, special person recognitions, workshop announcements, conference news and announcements, President's report and message, and Treasurer's Report. Posting to the SASFAA Nine News may occur at any time without regard to a specified schedule based on the nature or content of the posted item. Production and distribution of items may be posted to the SASFAA Nine News without regard to a specified fiscal year.

The SASFAA Nine News may also serve as the communications vehicle for the SASFAA President to extend a call to action during times of elevated legislative activity.

The Communication and Outreach Chair shall be appointed by the SASFAA President and approved by the Board. A Communication and Outreach

Committee shall be formed each year to assist the coordinator in reviewing, editing, and proofing the content of submissions.

The SASFAA Nine News is not for the purpose of promoting goods or services from a Sponsorship Chair. Such promotional materials should be submitted for publication after establishing a paid sponsorship package with the Sponsorship Chair.

The exception to this policy would be articles promoting goods or services offered through the state associations in the SASFAA region, or other state, regional or national associations representing student financial aid interests.

The SASFAA Nine News may include a calendar of training and development activities in the region. State associations, the SASFAA vice president, the U.S. Department of Education, guarantors, and state agencies may provide information for the calendar.

An individual may register with the SASFAA Nine News to receive an email notification following the posting of an item to the SASFAA Nine News.

SASFAA Executive Board members should submit timely articles or reports that coincide with the work of their committee/office. Following such a format would require each board member to write only one or two SASFAA Nine News entries a year. However, any SASFAA Executive Board member may submit an article or report at any time.

The SASFAA Nine News should allow for a regular, steady stream of news coming from the SASFAA leadership subject to the diligent adherence by the SASFAA Executive Board members to provide reports. Each SASFAA board

member should submit a sufficient number of reports to keep the SASFAA membership informed of the ongoing work of their committee or activities in their respective state.

8.4 Advertising

Advertising offers businesses and Business Partner Chairs an opportunity to market products and services to the membership. The Association gains operating funds through fees paid by businesses and/or Business Partner Chairs. It is incumbent upon the Board to establish guidelines to ensure that the quality, quantity and content of advertisements complement the mission of the Association. Please refer to Section 6.16 on Sponsorship.

Section 9: Gifts and Awards

SASFAA shall recognize and reward exemplary service or outstanding contributions to the Association or to the financial aid profession. Those individuals or entities identified by the Board as worthy of special recognition shall be honored.

9.1 Gifts and Amenities

The president shall have the discretion to present gifts and/or amenities to selected persons or groups to demonstrate the appreciation or gratitude of the Association.

9.2 Awards

Officers of the Association shall be presented with plaques upon completion of terms of service. The president shall make the presentations at a place and time deemed appropriate.

The president, upon approval of the Board, shall present awards, plaques or recognition to selected committee chairs, Board members, and others.

9.2.1 Distinguished Service Award

This is the highest honor bestowed by SASFAA. Individuals honored with a SASFAA Distinguished Service Award shall have made outstanding, significant, and meritorious contributions to the advancement of student financial aid or the profession. The awards committee, comprised of the elected officers of the Association, shall be charged to consider nominees and recommend them for consideration to the Board. Nominees must be approved by a two-thirds vote of Board members present and voting.

Each recipient shall be presented an appropriate plaque at the annual conference of the Association and shall be entitled to honorary membership in the

Association when the recipient ceases to meet active membership eligibility requirements.

The plaque presented to the recipient shall be approximately 14 ½ inch and 17 ½ inch. The following verbiage and format is recommended for this award.

THIS
DISTINGUISHED SERVICE AWARD
IS
PRESENTED TO
[Individual's Name]

IN RECOGNITION OF SIGNIFICANT CONTRIBUTIONS
TO HIGHER EDUCATION
AND STUDENT ASSISTANCE PROGRAMS
SOUTHERN ASSOCIATION OF STUDENT
FINANCIAL AID ADMINISTRATORS, INC.

[Date]

9.2.2 Honorary Membership

Honorary membership shall be awarded to persons who have demonstrated outstanding service to SASFAA and to the student aid profession. Practicing financial aid administrators are not eligible to receive this award. Past presidents and SASFAA Distinguished Service Award recipients who cease to meet active membership criteria as set forth in the Policies and Procedures Manual shall be automatically granted honorary membership. Past Presidents and SASFAA Distinguished Award recipients shall receive the same level of recognition as persons who receive honorary membership through the normal award process.

The Awards Committee shall solicit the names of individuals to be considered for honorary membership. Any voting member of the Board can make nominations. Individuals nominated for honorary membership must be approved by a majority vote of Board members present and voting.

A plaque will be presented with the following recommended verbiage:

(SASFAA Logo)
HONORARY LIFETIME MEMBERSHIP IN THE
SOUTHERN ASSOCIATION OF
STUDENT FINANCIAL AID ADMINISTRATORS, INC.
IS PRESENTED TO
XXXXXX
IN RECOGNITION OF SERVICE TO SASFAA AND
THE FINANCIAL AID PROFESSION
(DATE)

9.2.3 Officer Plaques

The president and other officers of the Association shall be presented with an appropriate plaque to commemorate the term of office with the following recommended format and verbiage:

(SASFAA Logo)
SOUTHERN ASSOCIATION OF
STUDENT FINANCIAL AID ADMINISTRATORS, INC.

Proudly Presents This
APPRECIATION AWARD
To
(Recipient's Name)

For Outstanding Service to the Association as
(Office and Fiscal Year)

(Date)

The current president distributes awards. The president typically receives recognition following the conclusion of the term of office. The president may designate when to receive the president's plaque.

9.2.4 Special Awards

By nomination by a Board member and approval of the Board, an individual or organization may receive a certificate of appreciation for one-time service to the financial aid community. Certificates presented on behalf of the Board shall bear the seal of the Association.

Certificates will be created on an as needed basis as SASFAA does not maintain a supply of hard copy certificates. The language to be included on these certificates will be created and approved by the Board on an individual basis, tailoring it to the reason the certificate is being awarded.

The president may choose to honor committee chairs with a certificate or a modest token of appreciation. The secretary will generate these certificates for the president's signature and they shall bear the seal of the Association. A recommended format and verbiage for the certificate follows:

*SOUTHERN ASSOCIATION OF
STUDENT FINANCIAL AID ADMINISTRATORS, INC.*

Proudly Presents This

APPRECIATION CERTIFICATE

To

(Recipient's Name)

For Outstanding Service to the Association as

the (Committee Name) Committee Chair

(Fiscal Year)

(Date)

Committee chairs may recognize their committee members with a certificate of appreciation for their year of service. The designated committee chair will generate these certificates and they do not need to bear the seal of the Association. A recommended format and verbiage for the certificate follows:

*SOUTHERN ASSOCIATION OF
STUDENT FINANCIAL AID ADMINISTRATORS, INC.*

Proudly Presents This

APPRECIATION CERTIFICATE

To (Recipient's Name)

For Outstanding Service to the Association as

a (Committee Name) committee Member

(Fiscal Year)

(Date)

9.2.5 Past-President Scholarship

In order to recognize the work and service of the President, SASFAA shall award a scholarship to be given to the Past-President's institution. The funds should be used to award a scholarship to a student with need. The amount should be determined by the Budget and Finance committee based upon the current financial environment. The amount shall be approved by the Executive Board when the annual budget is approved. This award can be paid any time during the Past-President year. The Past-President shall report the name of the recipient to the Executive Board.

Section 10: Financial

Maintaining the financial stability of the Association is paramount to ensuring its continued viability and service to its membership. The following Section establishes basic parameters for financial controls. The SASFAA Guide to Financial Management, referenced in Appendix C, provides operational information specific to the treasurer. The guide also provides guidance to the Board in its fiduciary responsibilities for the Association's funds.

10.1 Membership Dues

The Budget and Finance Chair should make a recommendation regarding the cost of annual membership dues at the first Board meeting of each fiscal year, and as needed thereafter. The Board reviews all recommendations to determine if a change to the cost of annual membership dues is justified. Any alteration approved by the Board that results in a potential increase in the cost of annual membership dues should move forward for consideration by the members of the Association as prescribed by the Bylaws.

Membership dues are non-refundable.

10.2 Conference, Events and Workshop Fees

The Budget and Finance Chair should make recommendations regarding the costs and fees associated with the annual conference, professional development events (e.g., conferences, symposiums, seminars, and/or workshops), and other special events at the first Board meeting of each fiscal year, and as needed thereafter. The Board reviews all recommendations to determine if the proposed costs and fees are justified.

10.2.1 Annual Conference Fees

The Budget and Finance Chair will consult with the Conference Committee to propose the annual conference budget. The annual conference budget will consider the annual conference fee, anticipated participant and sponsorship revenues, hotel and event contractual obligations, and other related income and expense items.

10.2.2 Professional Development Event Fees

The Budget and Finance Chair will consult with the Professional Advancement Committee to propose the budgets for all professional advancement events within the operative fiscal year. The professional advancement events' budgets will consider the event fee(s), anticipated participant and sponsor revenues, hotel and event contractual obligations, and other related income and expense items.

10.2.3 Special Event Fees

The Association periodically conducts special events to address the interests or needs of the membership. The Budget and Finance Chair will consult with the committee(s) responsible for organizing the event(s) to propose a budget(s) for all special events within the respective fiscal year. The special event budget(s) will consider the event fee, anticipated participant and sponsor revenues, hotel and event contractual obligations, and other related income and expense items.

10.2.4 Late Fees

Late fees will be automatically charged for registrations occurring fewer than 30 days prior to the event. All registration fees are fully refundable provided the requests for refunds are received by the Treasurer more than 30 days prior to the event. The President has the authority to waive late fees or provide refunds for unusual circumstances on a case-by-case basis. Authorized refunds will be credited to the payer via the method of payment used (e.g., check payments will be refunded by checks, credit card payments will be issued a credit return, etc.). This information must be included on all registration forms.

10.3 Waived Expenses

In certain occasions, it is appropriate to waive expenses of members or guests of the Association. Following are specific instances in which expenses may be waived:

- (1) membership dues for honorary members of the Association based on current policy governing honorary membership.

- (2) membership dues or registration fees to individuals who serve as invited guests of the Association. Examples of this include, but may not be limited to, guest speakers at conferences and/or workshops.

Any waiver of expenses should be documented in writing explaining the expenses being waived and the reason for granting the waiver. The responsible committee chairperson and the President should approve all waivers.

10.4 Insurance

Insurance policies are secured for financial protection of the Association. Insurance shall be in the form of a general bond that covers specified members of the Board or other Association members, as determined necessary by the Board. In addition, the Association maintains business liability coverage to protect the Association from suits in the event of personal injury.

10.4.1 Fidelity Bonding

Any individual having direct access to the Association's funds shall be bonded at SASFAA's expense. The Board establishes the amount of the bond coverage. The Board shall include the cost of the fidelity bond when constructing the operating budget each year.

Additional information pertaining to bond coverage is contained in Section 5.3 of the SASFAA Guide to Financial Management.

10.4.2 Liability Insurance

Liability insurance shall be obtained to cover directors/officers and general liability. In some instances, hotels and other meeting facilities require the cost of liability coverage to be borne by the contracting organization. The Board should consider this possibility when constructing the operating budget each year.

Additional information concerning liability insurance is contained in Section 5.4 of the SASFAA Guide to Financial Management.

10.5 Investments

Developing and maintaining sound investment strategies is a critical component to ensuring the Association's continued financial stability. Information specific to the Board's responsibilities regarding investments is outlined in Section 3 of the SASFAA Guide to Financial Management.

10.6 Travel Reimbursement Policy

Travel reimbursement is made available to members and some invited SASFAA guests for official SASFAA business. Policies may differ depending on the scope of those duties or the nature and location of the work being performed. A travel reimbursement form must be completed and submitted to the treasurer within thirty (30) days after travel has been completed. The committee chair must first approve reimbursement for committee members traveling on behalf of SASFAA. Refer to GFM 7.7 for acceptable signatures.

The President may approve payment of claims that were not submitted within thirty (30) days of the date the expense was incurred. The President, or Treasurer in the absence of the President, has the ability to make exceptions on a case-by-case basis when additional travel costs are necessary due to circumstances that may occur beyond the traveler's control.

10.6.1 General Travel

The Association shall reimburse members and invited guests for travel expenses incurred while performing required duties on behalf of the Association.

Reimbursements cover, but may not be limited to, the following items:

a. Mileage

Mileage rate shall not exceed the IRS business rate in effect on July 1st of each fiscal year. The limit is 500 miles each way on a trip.

Documentation of mileage (e.g. MapQuest, Google Maps, etc.) shall be provided with the expense reimbursement form. Normally, this reimbursement should not exceed the cost of lowest price, coach air fare. In circumstances when use of a car is preferred for personal reasons, reimbursement for mileage will be limited to the above.

b. Airfare

Volunteers make their own flight arrangements, and are asked to do so as soon as meeting dates are confirmed to obtain lower fares. All air travel should be purchased at lowest cost – coach class or equivalent. Travelers using a fare at a greater rate (such as first class) shall be reimbursed only for the applicable coach/coach equivalent rate for the flight. A copy of the ticket receipt must accompany the travel reimbursement request. In instances where a higher-class rate is used,

information to verify the coach/coach equivalent rate at the time of the reservation must be provided by the traveler.

An airline may use different terminology for classes other than basic and economy. See below for an example.

Example: Southwest Airlines has three class fares – Business Select (like first class), Anytime, and Wanna Get Away. The main difference between Anytime and Wanna Get Away is that Anytime is completely refundable and more expensive. Therefore, SASFAA would cover travel expenses on Southwest Airlines for the Wanna Get Away class fare.

SASFAA may cover seat upgrades for extenuating or medical circumstances. Documentation should be submitted with the request prior to purchase. These upgrades must be approved prior to purchase by an Authorized Approval Authority (President, Treasurer, or Budget & Finance Chair) other than themselves.

If a meeting is canceled or an emergency occurs, SASFAA will cover any cancellation, change, or other fees incurred as a result.

Checked bag fees are reimbursed at the rate of one checked bag per flight. If more than one bag is checked for SASFAA business, approval should be obtained prior to the flight. Approval may be granted by an Authorizing Approval Authority (President, Treasurer or Budget & Finance Chair) other than themselves.

Several budget airlines (Southwest, Spirit, Frontier, Jet Blue Allegiant, etc.) have early check-in, boarding position, and choice of seat options. Early check-in fees \$35.00 and under will be automatically approved. Any change to your boarding position or seat selection (coach/basic/economy) \$50 and less will be automatically approved. Any costs for these options over the stated amounts require prior approval by an Authorized Approval Authority (President, Treasurer, or Budget & Finance Chair) other than themselves.

c. Rental Vehicles

On an exception basis, the use of rental vehicles may be necessary to conduct SASFAA business. Prior approval of the President or Treasurer

is required, taking into consideration the cost effectiveness of the rental and ensuring that it is beneficial to SASFAA.

d. Taxis and Airport Shuttle/Limo Service and Parking

Such transportation shall be reimbursed at actual cost, including tip, if appropriate. Receipts are required with the travel reimbursement request.

e. Lodging

Reimbursement is for the actual cost of lodging, not to exceed the minimum pre-approved room rate at the hotel of the meeting event. Attendees to Board and Committee meetings are encouraged to share a room to help control expenses whenever possible as determined in advance by the President or Committee Chair. Receipts must accompany the claimant's request for reimbursement.

f. Meals

Meal expenses are not to exceed the daily rate of \$50.00. Members are encouraged to keep meal costs within the following parameters for each meal (Breakfast - \$10; Lunch - \$15; Dinner - \$25). These parameters are only guidelines to be used when making meal purchases, still keeping within the \$50 daily rate. In cases where meals are provided to members as a group or a partial allowance due to travel, the daily allowance will be reduced by the suggested amounts listed above.

Meal expenses are reimbursable at a rate established by the Board, except in cases where meals are provided to members as a group. In the event group meals are provided by SASFAA, the daily allowance will be reduced by the suggested amount for the meal provided. The exception is a "continental breakfast" will not be counted as a provided meal. For example, if dinner is provided, then the maximum reimbursable limit for that day is \$25.00.

All meal receipts must show the detail of the items purchased. Receipts that do not include the itemized detail will not be accepted for reimbursement without the President's approval.

Whenever possible, meal receipts submitted for reimbursement

should only include SASFAA reimbursable items. For example, if members are traveling with family, whenever possible the family member's meal should not be on the same receipt that the member submits for reimbursement or is paid for with a SASFAA credit card.

g. Tips

Tips, other than for meals or beverages, are reimbursable. (Tips for meals or beverages are included in the total for meals. See 10.6.1 (f). Receipts for tips exceeding \$10 must be provided. Exceptions to the \$10 maximum may be approved by the Treasurer or President.

h. Other Charges

Other charges related to travel and not itemized on the travel expense form must be approved by the President. As a general rule, receipts are required unless otherwise specified in the travel expense guidelines. Charges itemized on the travel expense form include meals, lodging, airfare, baggage, rental vehicle, taxi/limo/shuttle, tips, parking/tolls, and mileage.

10.6.2 President's Travel to State Meetings

Expenses for the president (or the president's designee) to attend state meetings of each of the nine member states shall be borne by SASFAA, except in the instance where the president is attending the state meeting in the president's home state. The hosting state association shall provide a complimentary registration. If available, the hosting state association shall provide complimentary lodging; otherwise, the cost shall be borne by SASFAA.

The Budget and Finance Chair along with the Treasurer may approve expenses of the President to attend his or her own state meeting on a case by-case basis.

10.6.3 Travel to NASFAA

a. Annual Conference

SASFAA shall cover all expenses for the outgoing past president, outgoing current president, and the outgoing president-elect to attend the annual conference. All travel expenses for the NASFAA board

meeting and NASFAA Conference (travel, conference registration, lodging, and meals) are paid by SASFAA.

Depending on the time of the NASFAA conference (i.e. conference prior to or after July 1st) the cost of the conference will be assigned to the budget year that the actual conference occurs.

b. NASFAA Board Meeting Prior to NASFAA Annual Conference

Summer (generally June or July) – For the **Outgoing Past-President** (rotates off the SASFAA Board in July), NASFAA does not cover travel expenses for the board meeting associated with the annual conference. NASFAA does pay for lodging and meals associated with the board meeting. Therefore, SASFAA will cover travel for the outgoing Past President (who serves as a voting member on the NASFAA board).

Summer (generally June or July) – For the **Outgoing President** (becomes SASFAA Past-President in July), NASFAA does not cover travel expenses or lodging for the board meeting associated with the annual conference. NASFAA does pay for meals associated with the board meeting. Therefore, SASFAA will cover travel and lodging for the outgoing President.

Summer (generally June or July) – For the **Outgoing President-Elect** (becomes SASFAA President in July), NASFAA does not cover travel, lodging, or meals for the board meeting associated with the annual conference. Therefore, SASFAA will cover travel, lodging, and meal expenses for the board meeting. The outgoing President-Elect is allowed to attend the board meeting in conjunction with the annual conference but begins official service as the SASFAA observer on the NASFAA board at the fall NASFAA Board Meeting.

Depending on the time of the NASFAA conference (i.e. meeting prior to or after July 1st) the cost of the board meeting will be assigned to the budget year in which the conference occurs.

10.6.4 Annual Conference/Preceding Board Meeting

Guidelines cover allowable reimbursable expenses incurred related to attending the annual conference and preceding board meeting. The following expenses shall be paid by SASFAA and charged against that officer's or committee chair's budget. State Presidents' expenses are charged to Executive Board, and Local Arrangements is charged to the conference/annual meeting.

Other expenses recommended by the Conference Chair and approved by the President and Treasurer may be covered.

a. Elected Officers

- Travel (see Section 10.6.1 (a), (b), (c), and (d))
- Lodging during the board meeting and the conference (see Section 10.6.1 (e))
- Meals during travel, during the board meeting and during the conference if not covered by the registration fee or SASFAA (see Section 10.6.1 (f))
 - Tips (see Section 10.6.1 (g))
- Other eligible expenses (see Section 10.6.1 (h)) Registration fee (comped)

b. Committee Chairs

- Travel (see Section 10.6.1 (a), (b), (c), and (d))
- Lodging for Friday and Saturday nights (see Section 10.6.1(e))
- Meals during travel and during the board meeting (through lunch on Sunday) (see Section 10.6.1 (f))
- Tips (see Section 10.6.1 (g))
- Other eligible expenses (see Section 10.6.1 (h))

In addition, for the Conference, Membership, Sponsorship, Local Arrangement, and Electronic Services Chairs or a designee for each position:

- Lodging during the conference (see Section 10.6.1 (e))
- Meals during the conference if not covered by the registration fee or SASFAA (see Section 10.6.1 (f))
- Registration fee (comped)

Each year the President and Budget and Finance Chair should review Committee Chair responsibilities at the conference to determine which positions should receive lodging and meals during the conference and a comped registration fee.

c. State Presidents

- Lodging for Friday and Saturday nights (see Section 10.6.1 (e))
- Meals during the board meeting (from the time the meeting begins through lunch on Sunday) (see Section 10.6.1 (f))

- Other eligible expenses (see Section 10.6.1 (h))

d. NASFAA CEO or designee, NASFAA Chair, Federal Government Employees, and Inter-Regional Guest(s)

- Registration fee (comped)
- For the NASFAA CEO and Inter-Regional Guest, lodging during the conference/annual meeting (see Section 10.6.1 (e))
- For Federal Government Employees, contract with hotel should allow for government per-diem rate which is self-pay (SASFAA cannot pay or comp).

e. Speakers, Presenters, and Invited Guests Not Affiliated with or members of SASFAA

Each year the Conference Chair should review the conference/annual meeting budget and decide what should be provided to speakers, presenters and guests who are not SASFAA members. The President must approve any offer. Traditionally comped rooms, if available, have been allocated as a way of compensating guests who are only attending to assist with the meeting, present session(s), or perform other duties and require an overnight stay. Generally, guests are not registered through Wild Apricot but are maintained on a list to create a name tag and be in a count for meal functions. If the guest is at the meeting during a meal function, that meal is covered by SASFAA.

f. Complimentary Rooms

If complimentary rooms are available based on the current contract with the conference hotel, the rooms should be assigned by the Conference Chair in cooperation with the President and Treasurer in the following order:

- President (in event room nights are not comped by the hotel as part of the contract)
- Conference Chair (in event room nights are not comped by the hotel as part of the contract)
- NASFAA and Invited Guests (President, Trainer, Inter Regional visitors)
- Treasurer
- Local Arrangements Chair, Sponsorship Chair, Vice President
- Past President

- President Elect
- Secretary

If complimentary rooms are not provided by the hotel, then expenses shall be paid by SASFAA and charged against that claimant's budget, if one exists. Otherwise, expenses are charged against the conference/annual meeting budget.

10.6.5 Board Meetings Other Than Preceding the Annual Conference and Transition Meeting

Guidelines cover allowable reimbursable expenses incurred related to attending a board meeting. The following expenses shall be paid by SASFAA and charged against that officer's or committee chair's budget. State Presidents' expenses are charged to Executive Board. Other expenses approved by the President and Treasurer may be covered.

a. Elected Officers and Committee Chairs

- Travel (see Section 10.6.1 (a), (b), (c), and (d))
- Lodging during the board meeting (see Section 10.6.1 (e))
- Meals during travel and during the board meeting (see Section

10.6.1 (f))

- Tips (see Section 10.6.1 (g))
- Other eligible expenses (see Section

10.6.1 (h))

b. State Presidents

- Lodging during the board meeting (see Section 10.6.1 (e))
- Meals during the board meeting (from the time the meeting begins until it ends as outlined in the agenda) (see Section 10.6.1 (f))
- Other eligible expenses (see Section 10.6.1 (h))

10.6.6 Transition Meeting

Guidelines cover allowable reimbursable expenses incurred related to attending the transition meeting. The following expenses shall be paid by SASFAA and charged against that officer's or committee chair's budget. State Presidents, State

Presidents-Elect, and New Committee Chair expenses are charged to Board. Other expenses approved by the President and Treasurer may be covered.

a. Elected Officers, Committee Chairs, New Officers, and New Committee Chairs

- Travel (see Section 10.6.1 (a), (b), (c), and (d))
- Lodging during the board meeting (see Section 10.6.1 (e))
- Meals during travel and during the board meeting (see Section 10.6.1 (f))
- Tips (see Section 10.6.1 (g))
- Other eligible expenses (see Section 10.6.1 (h))

b. State Presidents and State Presidents-Elect

- Lodging during the board meeting (see Section 10.6.1 (e))
- Meals during the board meeting (from the time the meeting begins until it ends as outlined in the agenda) (see Section 10.6.1 (f))
- Other eligible expenses (see Section 10.6.1 (h))

10.6.7 Professional Advancement Workshops

Guidelines cover allowable reimbursable expenses incurred related to attending a professional development workshop. The following expenses shall be paid by SASFAA and charged against that officer's budget or to the Professional Development Workshop. Other expenses approved by the President and Treasurer may be covered.

- Travel (see Section 10.6.1 (a), (b), (c), and (d))
- Lodging during the workshop (see Section 10.6.1 (e))

Meals during travel and during the workshop (see Section 10.6.1 (f))

- Tips (see Section 10.6.1 (g))
- Other eligible expenses (see Section 10.6.1 (h))
- Registration fee (comped)

The following positions generally plan to attend professional development workshop(s). Each year the President and Vice-President should review each workshop and budget and decide which positions are needed in attendance.

(1) President and President-Elect

- (2) Treasurer
- (3) Vice-President and Vice-President-Elect
- (4) Faculty and Presenters
- (5) Committee members who are vital to the planning and/or coordination of other types of professional development events, such as the Management Institute and Leadership Symposium.

10.6.8 State Presidential Exchange (Travel to State Conferences)

The Association shall sponsor each traveling state president-elect (or presidential designee in the event the president-elect cannot travel) up to \$500 travel expenses. Travel expenses must be in accordance with the Travel Reimbursement Policy 10.6.1 and shall not exceed \$500. Expense forms will be submitted to the Treasurer for approval within the timeframe stated in the Travel Reimbursement Policy 10.6. The intended purpose of this sponsorship is to cover allowable travel expenses (travel and meals in route). In the event travel expenses exceed \$500, the visiting state shall cover any remaining expenses.

It is the responsibility of the states (host and visiting) to coordinate other expenses such as conference fees, room cost, etc. A suggestion based on historical practice would be for the host state to waive conference registration and comp hotel room costs. The guest state would cover other expenses as necessary (e.g., meals not included in conference, travel expenses beyond \$500).

10.7 Credit Card Use

Credit cards are secured for elected officers and the conference chair to cover reimbursable expenses associated with performing their duties. SASFAA has established guidelines for the acquisition and use of credit cards.

- (1) The Treasurer shall secure credit cards for official SASFAA business use by elected officers and the Conference Chair.
- (2) The credit line of the President and Vice President shall be no more than \$5,000. The credit line of all other cards shall be no more than \$3,500.
- (3) The Treasurer shall provide written guidance to each cardholder explaining appropriate card use and reporting requirements.
- (4) All expenses charged to a credit card must be reported by the user to the treasurer within ten (10) days of receiving his/her credit card statement. All itemized charges on the statement must correspond to a valid receipt. All expenses charged to a credit card by the treasurer must be reported to the

Budget and Finance Chair within ten (10) days of receiving his/her credit card statement. All itemized charges on the statement must correspond to a valid receipt.

- (5) Cardholders shall surrender their cards to the treasurer within ten (10) days of the expiration of their term of office, or at the direction of the president. In the case of the out-going Past-President, the card shall be surrendered to the treasurer within ten (10) days after the conclusion of the NASFAA Annual Conference if SASFAA is covering any expenses under other policies for the out-going Past- President to attend any part of the NASFAA Conference and/or Board meeting.
- (6) Charging personal expenses to the Association credit card is prohibited. Any violations of this policy will require immediate repayment to SASFAA. The treasurer must report to the Board at the next board meeting. If repayment is not submitted within 30 days the credit card will be revoked.
- (7) Violations of card use policies may result in cancellation of credit card privileges.
- (8) Prior to issuing a SASFAA credit card, the treasurer will obtain from each credit card user a signed Agreement of Understanding. This agreement outlines the obligations of the user and an understanding about potential liabilities. (see Attachment B of the Guide to Financial Management)
- (9) Credit card information shall not be shared to an entity via email or fax. This information will be given via telephone or by overnight tracked delivery only
- (10) In situations where the SASFAA credit card is used by board members conducting NASFAA business as a result of their SASFAA position, the following documents must be submitted to the Treasurer to justify and explain the charges on the SASFAA credit card:
 - a. Reimbursement form submitted to NASFAA for reimbursable charges on the SASFAA credit card.
 - b. Receipts submitted to NASFAA that match the reimbursable charges on the SASFAA credit card.
 - c. Documentation of mileage (e.g. MapQuest, Google Maps, etc.) shall be provided regarding mileage in situations where reimbursement is being sought for this expense.
 - d. SASFAA credit card log

10.8 Reserve Fund

Maintaining liquidity of funds helps ensure that the Association will be able to cover its

contractual obligations and continue operations. A reserve fund is established to ensure the Association's ability to cover its contractual obligations.

Specific information concerning the Board's responsibilities regarding establishing and maintaining a reserve fund(s) is contained in Section 3.4 of the SASFAA Guide to Financial Management.

10.9 Dissolution of Assets

Disposal or sale of any assets held by the Association shall be at the direction of the Board.

Procedures for disposing of unusable tangible assets are outlined in Section 6.5(c) of the SASFAA Guide to Financial Management.

10.10 Other Financial Guidelines

Listed below are additional guidelines associated with financial matters of the Association.

- (1) The treasurer shall have the authority to pay bills based on existing budget guidelines after the expiration of the fiscal year. Such authorization is effective until such time that the Board approves a new budget.
- (2) Approval of both the Treasurer and the President are required for any expense of \$5,000 or more.
- (3) The President has authority to exceed any budget line by \$500.
- (4) When official action by the Board is not feasible, the President may authorize the treasurer to pay expenses that exceed the budget amount for the following budget categories:

☐ Professional Advancement (Budget Code 203)

☐ Conference/Annual Meeting (Budget code 206)

It is the responsibility of the treasurer and/or the president to report overbudget expenditures.

10.10.1 SASFAA Conflict of Interest Policy

Specific information concerning the SASFAA Conflict of Interest Policy is contained in SASFAA Conflict of Interest Policy, which is referenced in Appendix C.

10.11 Bookkeeper

Reporting to the SASFAA Board of Directors, with the SASFAA Treasurer serving as the conduit for doing so, the primary responsibilities of the Bookkeeper include:

- (1) establishes and maintains financial accounts while receiving and disbursing monies of the Association;
- (2) maintains adequate and appropriate records of receipts and expenditures;
- (3) pays the bills of the Association within thirty (30) days;
- (4) pays reimbursements to the members within fourteen (14) days; receives all payments to the Association including meeting registrations, membership dues, and exhibitor or payments;
- (5) maintains information for any speakers who are paid honoraria, as this information must be provided to the accountant so that a Form 1099 can be prepared for each individual;
- (6) collects payments (income) from vendors, members, or any other entity providing a payment to the association;
- (7) deposits cash and check payments (income) received into the appropriate SASFAA bank account;
- (8) makes payments on behalf of the Association that are within the approved SASFAA Budget and/or approved by the SASFAA Board of Directors;
- (9) pays reimbursement requests that are within the approved SASFAA Budget and/or outlined in the SASFAA reimbursement policies (reference P&P section for associated policies);
- (10) maintains records of all income and paid expenses/reimbursements, including, but not limited to:
 1. Reimbursement forms
 2. Receipts
 3. Realized investment gains and losses
 4. Deposit confirmations;
- (11) reconciles monthly bank statements with association records;
- (12) provides records to the Budget & Finance Committee for scheduled reviews during the year;
- (13) reconciles and pays SASFAA credit card statements;
- (14) complies with all SASFAA record retention requirements, and for maintaining appropriate back up documentation to facilitate recovery of records in the event of an unforeseen circumstance, such as a natural disaster, computer failure, or other yet to be identified situation.

Section 11: Conferences/Workshops/Events

The Association shall conduct conferences, workshops, training sessions and other events as deemed appropriate to promote the professional preparation and effectiveness of SASFAA members.

11.1 Conferences and Conference Planning

The host state association shall not be required to provide any direct financial assistance to the conference but shall be expected to provide staffing assistance to conference functions and retains fiscal responsibility of providing the funding for the state hospitality/commuter suite.

Election of SASFAA officers shall commence ten (10) calendar days prior to the first business meeting at the annual conference and close at 3 pm local time on the last full day of the conference.

11.1.1 Training at the Annual Conference

The conference committee will coordinate all training activities held in conjunction with the annual conference.

11.1.2 Association Sponsors

To help support SASFAA activities, the Association solicits financial support from entities associated with the delivery of student financial aid. Business Partner wishing to participate in SASFAA conferences and workshops should contact the Business Partner Chair. (See Section 6.16 for specific information pertaining to sponsorship policies.)

11.1.3 Coordination of Sponsored Activities and Schedules

All sponsored activities shall be coordinated through the Business Partner Chair. All sponsored activities must be approved by SASFAA. Sponsored activities shall in no way conflict with other scheduled events or activities conducted by SASFAA.

The Sponsor area shall be closed during general sessions.

Business Partner Chairs who wish to hold separate events in conjunction with the Annual Conference will be asked to follow these guidelines:

- The Business Partner Chair will need to handle all of the coordination for this event, including any room reservations, contracts, and other planning. Since these are not sanctioned SASFAA events, SASFAA

will not work with the hotel to try and afford the Sponsorship Chair any of the cost “breaks” that the Association receives for the conference expenditures. The Business Partner Chair will need to negotiate their own cost structure with the hotel.

- The hotel will not display any advertising for these events in any of the areas under contract by SASFAA, nor provide the Business Partner Chair with any hotel sleeping room information for SASFAA registrants, which includes, but is not limited to, assistance in advertising this program to each of the SASFAA registrants by means of flyers in their room, notification of the event upon check-in, or any other method.
- SASFAA will not include any promotional materials for the event in any other conference related items, including the SASFAA website, conference bags, etc.
- The SASFAA listserv may not be used to advertise these events.

11.1.4 Ex-Officio Members

Ex-officio members to the conference committee are the treasurer, Business Partner Chair, and membership chair.

11.2 Training Events

Training activities may be offered to out-of-region individuals at the discretion of the Board; however, fees for all SASFAA training programs will include the equivalent for membership if the participant is not a current member.

11.3 Summer Workshop

Every effort shall be made to avoid scheduling the summer workshop for the same period as the NASFAA national conference, or other significant activities. Specific guidelines for planning and conducting the summer workshop are referenced in Appendix B of this manual.

11.4 Alcohol Use

With a concern for our shared professionalism and a sense of both social responsibility and fiscal constraint, the SASFAA Board authorizes the purchase of alcohol for SASFAA events. The SASFAA Board is expected to exercise good judgment in the amount of SASFAA funds spent on alcoholic beverages at these functions.

11.4.1 Alcohol Reimbursement Policy

SASFAA will not pay for or reimburse members' expenses for alcoholic beverages at committee or Board meal functions. SASFAA committee chairs are responsible for their committee's compliance to this policy.

11.5 Music Copyright Policy

See Section 8.2, Copyright Policy.

11.6 Honoraria

The Association shall make available to presenters, speakers, contributors, faculty, and others remuneration for services rendered. The amount of honoraria should not exceed the IRS threshold requiring the completion of a 1099 by SASFAA, which is currently \$600. Individual recipients have a responsibility to report the income on their personal tax return. The following policies shall serve as guidance.

11.6.1 Annual Conference

Honoraria shall be paid by SASFAA and charged to the annual meeting account for speakers and presenters, upon recommendation of the conference chair and approved by the president and treasurer.

11.6.2 Summer Workshops

The following honoraria shall apply to summer workshops:

- a. New Aid Officer's Workshop – Site Coordinator (\$599); Curriculum Director (\$599); Faculty (\$500)
- b. Mid-Level Workshop – Faculty (\$200)

If the amount of the honoraria proposes a financial hardship to the Association, the amount may be lowered at the discretion of the Executive Board.

SASFAA shall develop and provide a written contract for faculty in the summer workshop. As a part of the contract all staff would sign this statement: *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. If I violate this contract and/or code of conduct my honorarium may be revoked. I understand that contract and/or code of conduct valuations may be reported to the institution where I work.*

Section 12: Association History

12.1 Minutes of the First Organizational Meeting

Minutes of the first organizational meeting are included as Appendix A, to this Manual.

12.2 Conferences and Meetings

To serve the Association membership effectively, SASF AA should hold its conference, meetings, and training throughout the region when feasible.

12.2.1 SASF AA Annual Conference Sites

The following is a chronological listing of annual conference sites.

Year	State	Site
1964	Virginia	Charlottesville
1965	Georgia	Atlanta
1966	Georgia	Atlanta
1967	Georgia	Atlanta
1968	North Carolina	Charlotte
1969	Florida	Jacksonville
1970	Georgia	Atlanta
1971	Tennessee	Memphis
1972	Alabama	Birmingham
1973	Georgia	Atlanta
1974	Georgia	Atlanta
1975	Virginia	Richmond
1976	Georgia	Atlanta
1977	Kentucky	Louisville
1978	South Carolina	Myrtle Beach
1979	Florida	Orlando
1980	Mississippi	Biloxi
1981	Alabama	Birmingham
1982	Tennessee	Nashville
1983	Kentucky	Lexington
1984	Georgia	Atlanta
1985	North Carolina	Greensboro
1986	Virginia	Norfolk
1987	South Carolina	Charleston
1988	Tennessee	Memphis
1989	Florida	Miami
1990	Kentucky	Louisville
1991	North Carolina	Asheville
1992	Virginia	Richmond
1993	Alabama	Birmingham
1994	Florida	Orlando
1995	Georgia	Atlanta
1996	South Carolina	Hilton Head

1997	North Carolina	Greensboro
1998	Tennessee	Nashville
1999	Virginia	Norfolk
2000	Mississippi	Biloxi
2001	South Carolina	Hilton Head
2002	Kentucky	Louisville
2003	Florida	Jacksonville
2004	Alabama	Birmingham
2005	Georgia	Atlanta
2006	North Carolina	Greensboro
2007	Tennessee	Nashville
2008	Virginia	Crystal City
2009	South Carolina	Myrtle Beach
2010	Kentucky	Louisville
2011	Florida	Jacksonville
2012	North Carolina	Greensboro
2013	Georgia	Atlanta
2014	Florida	Jacksonville
2015	Tennessee	Memphis
2016	North Carolina	Greensboro
2017	Mississippi	Biloxi
2018	Virginia	Alexandria
2019	Georgia	Atlanta
2020	Virginia	Norfolk
2021	Virtual	
2022	Alabama	Montgomery
2023	Tennessee	Chattanooga

12.2.2 SASFAA Annual Conference Sites Summary by Year

The following is a listing of annual conference dates for each state.

Alabama	Florida	Georgia	Kentucky	Mississippi
1972	1969	1965	1977	1980
1981	1979	1966	1983	2000
1993	1989	1967	1990	2017
2004	1994	1970	2002	
2022	2003	1973	2010	
	2011	1974		
	2014	1976		
		1984		

		1995		
		2005		
		2013		
		2019		

North Carolina	South Carolina	Tennessee	Virginia
1968	1978	1971	1964
1985	1987	1982	1975
1991	1996	1988	1986
1997	2001	1998	1999
2006	2009	2007	2008
2012		2015	2018
2016		2023	2020

12.2.3 Summer Workshop Sites

The following is a chronological listing of sites that hosted the SASFAA summer workshop.

Year	State	Site
1965	North Carolina	North Carolina State University, Raleigh
1966	Tennessee	Southwestern at Memphis, Memphis
1967	Florida	Florida State University, Tallahassee
1968	Tennessee	Vanderbilt University, Nashville
1969	Kentucky	University of Kentucky, Lexington
1970	Mississippi	Millsaps College, Jackson
1971	Tennessee	University of Tennessee, Knoxville
1972	North Carolina	University of NC at Charlotte, Charlotte
1973	Alabama Virginia	Samford University, Birmingham of Richmond, Richmond
1974	South Carolina Tennessee	University of South Carolina, Columbia Memphis State University, Memphis
1975	Georgia Tennessee	University of Georgia, Athens Memphis State University, Memphis
1976	Florida Mississippi	Eckerd College, Petersburg Mississippi State University, Starkville
1977	South Carolina Tennessee	Columbia College, Columbia Vanderbilt University, Nashville
1978	North Carolina Alabama	University of NC at Ashville, Ashville Spring Hill College, Mobile

1979	Virginia Georgia	Hollins College, Roanoke Mercer University, Macon
1980	Florida Kentucky	Rollins College, Winter Park Transylvania University, Lexington
1981	North Carolina	University of NC at Charlotte, Charlotte
1982	North Carolina	University of NC at Charlotte, Charlotte
1983	North Carolina	University of NC at Charlotte, Charlotte
1984	North Carolina	University of NC at Charlotte, Charlotte
1985	Florida	Florida State University, Tallahassee
1986	Virginia	University of Richmond, Richmond
1987	North Carolina	University of NC at Charlotte, Charlotte
1988	Florida	Florida International University, Miami
1989	Alabama	University of South Alabama, Mobile
1990	Georgia	Agnes Scott College, Decatur
1991	South Carolina	Clemson University, Clemson
1992	North Carolina	Davidson College, Davidson
1993	Georgia	Agnes Scott College, Decatur
1994	Georgia	Agnes Scott College, Decatur
1995	South Carolina	College of Charleston, Charleston
1996	Mississippi	Millsaps College, Jackson
1997	Mississippi	Millsaps College, Jackson
1998	Florida	University of South Florida, Tampa
1999	Florida	University of South Florida, Tampa
2000	South Carolina	Furman University, Greenville
2001	South Carolina	Furman University, Greenville
2002	South Carolina	Furman University, Greenville
2003	South Carolina	Furman University, Greenville
2004	Florida	University of South Florida, Tampa
2005	North Carolina	UNC – Asheville
2006	North Carolina	UNC – Asheville
2007	South Carolina	Furman University, Greenville
2008	Kentucky	Bellarmino University, Louisville
2009	South Carolina	Clemson University, Clemson
2010	South Carolina	Clemson University, Clemson
2011	South Carolina	Clemson University, Clemson
2012	North Carolina	North Carolina Central University, Durham
2013	Alabama	Auburn University, Auburn
2014	South Carolina	USC Upstate, Spartanburg
2015	Kentucky	Thomas More College, Crestview Hills
2016	Alabama	Jacksonville State University, Jacksonville

2017	Alabama	Jacksonville State University, Jacksonville
2018	South Carolina	Wofford College, Spartanburg
2019	South Carolina	Wofford College, Spartanburg
2020	Virtual	
2021	Virtual	
2022	South Carolina	Wofford College, Spartanburg
2023	South Carolina	Wofford College, Spartanburg

12.2.4 Leadership Seminars

The following provides a chronological listing of sites that hosted the SASFAA Leadership seminars.

Date	Location	Seminar Topic
July 1972	Tampa, FL	Responsibilities of Aid Administrators in High Education
November 1977	Atlanta, GA	Invitational Conference on Student Aid
December 1979	Atlanta, GA	A Model Student Aid Delivery System
March 1986	Asheville, NC	Educational Financial Planning
December 1986	Asheville, NC	Educational Financial Planning II
December 1988	Asheville, NC	Professional Management Institute
December 1994	Asheville, NC	Leadership Symposium
December 1998	Alexandria, VA	Management Institute
December 2004	Asheville, NC	Management Institute
December 2005	Asheville, NC	Management Institute
March 2006	Charlotte, NC	Leadership and Strategic Planning Summit
March 2007	Charlotte, NC	Leadership Symposium
December 2008	Asheville, NC	Management Institute
December 2008	Asheville, NC	Leadership Symposium
November 2014	Birmingham, AL	Leadership Symposium
October 2015	Orlando, FL	Management Institute
October 2016	Orlando, FL	Leadership Symposium
October 2017	Orlando, FL	Enrollment Management Forum
February 2019	Atlanta GA	Leadership Symposium
October 2019	Charlotte, NC	Legal Issues in Higher Education
2020 – 2021	Virtual/Zoom	Leadership Symposium 2020
April 2021	Virtual	2021 Enrollment Management Forum
October 2022	Chattanooga, TN	2022 Management Institute

12.2.5 Mid-Level Workshop Sites

The following provides a chronological listing of sites that hosted the SASFAA mid-level workshops. These workshops began in the summer of 2002 in conjunction with the Southwest Association of Student Financial Aid Administrators (SWASFAA).

Date	Location	Workshop Topic
June 2002	Millsaps College, Jackson, MS	
June 2003	Centenary College, Shreveport, LA	
June 2004	Millsaps College, Jackson, MS	
June 2006	Furman University, Greenville, SC	
June 2007	Crowne Plaza Suites Arlington, TX	
May 2008	Hilton Garden Inn Louisville, KY	The Many Hats of FAA's
February 2010	Hyatt Regency Louisville, KY	
February 2011	Hyatt Regency Jacksonville, Florida	
February 2016	Sheraton Hotel, Greensboro, NC	
February 2020	Hilton Norfolk the Main, Norfolk VA	

12.3 SASFAA Presidents

The following provides a chronological listing of the presidents of the Association.

Year	Name	Institution and Location
1963-65	James F. Carr, Jr.	Florida Board of Regents, FL
1965-66	Kingston Johns	The College Board, GA
1966-67	Charles H. Watson	Georgia Tech, GA
1967-68	Robert B. Kimmell	Florida State University, FL
1968-69	Kenneth L. Wooten	University of Mississippi, MS
1969-70	Cannon R. Mayes	SC Commission of Higher Education, SC
1970-71	James E. Ingle	University of Kentucky, KY
1971-72	Eunice L. Edwards	Fisk University, TN
1972-73	Richard L. Waters	University of Tennessee, TN
1973-74	Winston Bruce	E. Thomas Cleveland
1974-75	Priscilla M. Light	Lynchburg College, VA
1975-76	David L. Hartshorn	Florida Junior College, FL
1976-77	Joe L. McCormick	Mississippi State University, MS
1977-78	William M. Geer	University of NC at Chapel Hill, NC
1978-79	Gerald T. Bird	University of Alabama-Birmingham, AL
1979-80	Curtis R. Whalen	University of NC at Charlotte, NC
1980-81	Herb Vescio	Eastern Kentucky University, KY
1981-82	Benny H. Walker	Furman University, SC
1982-83	Cheryl Wilkes O'Keefe	Medical College of Georgia, GA
1983-84	Preston Rosser	Valencia Community College, FL
1984-85	Marvin G. Carmichael	Clemson University, SC
1985-86	Eleanor S. Morris	University of NC at Chapel Hill, NC
1986-87	Daniel L. Miller	Phillips Colleges, MS
1987-88	Vernetta P. Fairley	Pearl River Community College, MS
1988-89	Patsy Braxton	North Carolina School of the Arts, NC

1989-90	William P. Rodgers	Phillips Colleges, MS
1990-91	Don Rainer	AL Commission on High Education, AL
1991-92	Marleen Ingle	University of NC at Greensboro, NC
1992-93	Cruzita Lucero	Walters State Community College, TN
1993-94	David R. Gelinas	University of the South, TN
1994-95	David Cecil	Eastern Kentucky University, KY
1995-96	Karen Fooks	University of Florida, FL
1996-97	Joel V. Harrell	University of Tennessee-Chattanooga, TN
1997-98	Carol A. Mowbray	Northern Virginia Community College, VA
1998-99	Susan Little	University of Georgia, GA
1999-00	Mary Givhan	Mississippi College, MS
2000-01	Bill Cox	Meredith College, NC
2001-02	Clark Aldridge	University of Montevallo, AL
2002-03	Karen Koonce	Tidewater Community College, VA
2003-04	Ron Day	Birmingham Southern College, AL
2004-05	Janet Sain	ECPI, NC
2005-06	Guy Gibbs	Northern Virginia Community College, VA
2006-07	Brent Tener	Vanderbilt University, TN
2007-08	Lisanne Masterson	Brevard College, NC
2008-09	Heather Boutell	Bellarmino University, KY
2009-10	Keith Reeves	Clemson University, SC
2010-11	Sandra Neel	Bellarmino University, KY
2011-12	Brad Barnett	James Madison University, VA
2012-13	Jeff Dennis	Southern Wesleyan University, SC
2013-14	Zita Barree	Hampden-Sydney College, VA
2014-15	Nathan Basford	Florida State University, FL
2015-16	Amy Berrier	UNC Greensboro, NC
2016-17	Marian Dill	Lee University Cleveland, TN
2017-18	Sharon Oliver	North Carolina Central University, N.C.
2018-19	Bryan Erslan	Eastern Kentucky University, KY
2019-20	William “Bill” Spiers	Tallahassee Community College, FL
2020-21	Celena Tulloss	University of Tennessee, TN
2021-22	Celena Tulloss	University of Tennessee, TN
2022-23	Michael Morgan	Rhodes College, TN

12.4 Honorary Members

The following is a list of individuals who have received honorary membership.

- Clark Aldridge

- John Bannister*
- Nathan Basford
- Patsy Braxton
- Jerry Bird*
- Winston Bruce*
- John Burns
- Marvin Carmichael*
- James F. Carr, Jr.
- David Cecil
- Marilyn Clark-Watkins
- E. Thomas Cleveland
- Ron Day
- Karen (Koonce) DeFilippo
- Judy Deines
- Eunice Edwards*
- Vernetta Fairley
- Karen Fooks
- Palmer Freeman*
- Bill Fron
- William M. Geer
- Guy Gibbs*
- Mary Givhan
- Ellen Green
- David L. Hartshorn
- James E. Ingle
- Marleen Ingle
- Kingston Johns*

- H. S. “Buddy” Johnston
- Robert B. Kimmell
- Priscilla Light
- Susan Little
- Susan Luhman
- Dallas Martin
- Lisanne Masterson
- Cannon R. Mayes
- Carney McCullough
- Daniel Miller
- Eleanor S. Morris
- Carol Mowbray
- Janet Nowicki
- Cheryl W. O’Keefe
- Shelley Park
- Carl D. Perkins*
- Don Rainer
- Tim Rhodes
- Larry Ridgeway
- Preston Rosser*
- Guy Snavely*
- Elinor Starr
- Nancy Tate
- Ray Tripp
- Lisa Turner
- Herb Vescio*
- Bill Wall

- Richard L. Waters
- Charles H. Watson*
- Betty Whalen
- Curtis Whalen
- Jack Woodward
- Kenneth L. Wooten
- David Gelinas

*Deceased

12.5 Award Recipients

SASFAA recognizes outstanding service to the Association and the financial aid profession through its award process.

12.5.1 SASFAA Distinguished Service Award Recipients

The following is a list of individuals recognized for distinguished service:

Year	Recipient	Institution
1981-82	Dr. Neal Berte	Birmingham-Southern College
1982-83	Carl D. Perkins	U.S. House of Representatives
1983-84	Dr. Dallas Martin	NASFAA
1984-85	Eunice Edwards Herb Vescio	Fisk University Eastern Kentucky University
1986-87	William M. Geer	University of NC at Chapel Hill
1986-87	Palmer Freeman	Leroy Springs Foundation
1987-88	Dr. James F. Carr	Harding College
1988-89	Guy Snavelly	Pickett and Hatcher Educational Fund, Inc.
1989-90	Dr. William Wall	Alabama Commission on Higher Education
1990-91	Vernetta P. Fairley	University of Southern Mississippi
1991-92	Cheryl Wilkes O'Keefe	Medical College of Georgia
1992-93	Preston Rosser	Valencia Community College
1993-94	Gerald T. Bird Robert Evans	College Scholarship Service U.S. Department of Education
1994-95	Marvin G. Carmichael Francine Reeves	Clemson University U.S. Department of Education
1995-96	Ron Gambill	Tennessee Student Assistance Corp.
1996-97	Jack L. Woodward Cruzita Lucero	Millsaps College Walters State Community College
1997-98	David Cecil Karen Fooks	Transylvania University University of Florida

1998-99	Curtis Whalen Betty Whalen	University of NC at Charlotte Wingate College
1999-00	Joel Harrell	Clark Atlanta University
2000-01	Randy Craig Eleanor S. Morris	Education Credit Management Corp. University of NC at Chapel Hill
2001-02	Susan Little Carol Mowbray	University of Georgia Northern Virginia Community College
2002-03	Mary Givhan Ken Player	Mississippi College South Carolina Student Loan Corp.
2003-04	Jane McNaughton	Union Planters Bank
2004-05	Bob Godfrey	University of South Carolina- Columbia
2005-06	Clark Aldridge David Gelinis	Collegiate Funding Services University of the South
2006-07	Janet Sain Nowicki Rosemary Stelma	Sun Trust Education Loans East Carolina University
2007-08	Guy Gibbs Greg Martin	Northern Virginia Comm. College U.S. Department of Education
2008-09	Bill Cox Karen Koonce	NC State Education Assistance Authority Wachovia
2009-10	Debra Talley	University of Alabama, Birmingham
2010-11	Ron Day	Kennesaw State University, Georgia
2011-12	David Bartnicki	U.S. Department of Education
2012-13	Brent Tener	Vanderbilt University
2013-14	David Mohning	Vanderbilt University
2014-15	Heather Boutell Jeff Dennis	Bellarmino University Greenville Technical College
2015-16	Nancy Tate	Anderson University
2016-17	Brad Barnett Sandra Neel	James Madison University Louisville University
2017-18	Lisanne Masterson	Blue Ridge Community College
2018-19	Keith Reeves	Clemson University
2019-20	Dr. Sharon Oliver	North Carolina Central University
	Zita Baree	Hampden-Sydney College
2020-21	Bryan Erslan Marian Dill Buddy Johnston	Eastern Kentucky University Lee University Radford University
2021-22	Amy Berrier-Gerber	Central Carolina Community College
2022-23	Nathan Basford William Spiers	Florida State University Tallahassee Community College

12.5.2 NASFAA Regional Leadership Award Recipients

The following SASFAA members have received NASFAA's leadership award:

Year	Name	Institution
1989	Herb Vescio	Eastern Kentucky University
1990	Marie A. Bennett	Northern Virginia Community College
1991	Vernetta P. Fairley	University of Southern Mississippi
1992	Cheryl Wilkes O'Keefe	Medical College of Georgia
1993	Ron Gambill	Tennessee Student Assistance Corp.
1994	Marvin G. Carmichael	Clemson University
1995	Ray Tripp	University of Georgia
1996	Cruzita Lucero	Walters State Community College
1997	Helga Greenfield	Shaw University
1998	Dr. William H. Wall	AL Commission on Higher Education
1999	Karen Fooks	University of Florida
2000	Curtis Whalen	University of NC at Charlotte
2001	Susan Little	University of Georgia
2002	Joel Harrell	Clark Atlanta University
2003	Carol Mowbray	Northern Virginia Community College
2004	Dave Gelinas	University of The South
2005	Karen Koonce	Tidewater Community College
2006	David Cecil	Transylvania University
2007	Bob Godfrey	University of South Carolina
2008	Betty Whalen	Winthrop University
2009	Janet Sain	SunTrust
2010	Brent Tener	Vanderbilt University
2011	David Mohning	Vanderbilt University
2012	Lisanne Masterson	Blue Ridge Community College
2013	Heather Boutell	Bellarmino University
2014	Sandra Neel	University of Louisville
2015	Brad Barnett	James Madison University
2016	Ron Day	Kennesaw State University
2017	Jeff Dennis	Greenville Technical College
2018	Nathan Basford	Florida State University
2019	Amy Berrier	UNC Greensboro
2020	Keith Reeves	Clemson University
2021	Zita Baree	Hampden-Sydney College
2022	Runan Evans	Bluegrass community and Technical College

12.5.3 NASFPA State Awards for SASFPA States

The following is a list of SASFPA states that have won the NASFPA State Award.

Year	Award	State	Project
1986	Service to the Financial Aid Profession	FL	Chancellor's Workday
	Service to Other Constituencies	VA	Restoring Balance in Student Financial Aid Programs in Virginia
1987	Service to the Financial Aid Profession	FL	Financial Aid "Yellow Pages"
	Service to the Aid Profession	SC	Research on Student Financial Aid Concerns
	Service to Other Constituencies	KY	Conference Bridging for Success
1988	Service to Students, Parents and Families	VA	Movin' on Down the Road – Preparing for College in Virginia
	Service to Other Constituencies	AL	Solving the Financial Aid Puzzle
1989	Service to Other Constituencies	MS	MASFPA Gram
1991	Service to the Financial Aid Profession	FL	Training Session on Legal Issues Affecting the Administration of Student Financial Aid
	Service to Other Constituencies	TN	Summer Internships for Counselors (High School Counselors Train at Financial Aid Offices)
1992	Service to the Financial Aid Profession	FL	Multi-Cultural Diversity and Immigration Issues in the 1990's: The Plight of the New Americans
1995	Service to the Financial Aid Profession	VA	Best Practices Project
1996	Service to Advancing the Goals of Access to Diversity	KY	Preparing the College, It's a Must
1997	Honorable Mention for Service to the Financial Aid Profession	FL	You've Been Elected! Now What? A Survival Guide for Future FASFPA
1998	Service to Other Constituencies	SC	High School Guidance Counselor Handbook on the Internet
	Service to Students	TN	Funding Your Future: Financial Aid for Students
1999	Service to Other Constituencies	NC	Financial Aid Presentation for High School Guidance Counselors on the Web
2000	Service to Other Constituencies	MS	Pace Setter's Camp

2001	Service to Parents and Students	TN	The Forgotten Constituents: Reaching Out to the Home Schoolers
	Service to Financial Aid Professionals	FL	Ambassadors Committee
2002	Service to Other Constituencies	GA	"A Roadmap to Success" tool for high school and TRIO counselors
2004	Service to the Financial Aid Profession	NC	Neophyte Listserv - Connecting New Aid Professionals with Veteran Administrators
2005	Service to Financial Aid Profession	SC	Peer Support Network for Financial Aid Officers
	Service to Other Constituencies	KY	Taskforce to Review Financial Aid Program Regulations
2007	Service to Other Constituencies	VA	VASF AA Association Business Cards
2008	Service to Advance Access and Diversity	NC	Middle School Scholarship Enrichment Program
2009	Service to Advance Access and Diversity	FL	FASF AA Foster Youth College Access Brochure
2009	Service to the Financial Aid Profession	VA	Self-Assessment for Optimum Compliance Webinar Series
2013	Gold Star Award	FL	Clock Hour Group and Program
2020	Gold Star Award	FL	Clock Hour Workshop

12.5.4 NASF AA Regional Awards

The following is a list of NASF AA Regional Awards that have won by SASF AA.

Year	Award	Project
2008	Service to Colleagues or Constituencies	A Conference Manual and Guidebook.
2012	Service to Colleagues or Constituencies	Associations Collaborating for Advocacy on the Hill
2019	Gold Star Award	State President's Guidebook

12.6 Record of Members Voting in SASFAA Elections

Beginning with the annual 2000 conference the number of members casting ballots has been maintained.

Date	Absentee Ballots Cast	Ballots Cast at the Conference	Total Ballots Cast
February 2000	55	537	592
February 2001	59	583	642
February 2002	77	477	554
February 2003	29	473	502
February 2004	45	615	660
February 2005*			565
February 2006			502
February 2007			541
February 2008			694
February 2009			484
February 2010			376
February 2011			348
February 2012			431
February 2013			370
February 2014			409
February 2015			400
February 2016			377
February 2017			392
February 2018			298/936 (32%)
February 2019			388
February 2020			507
February 2021			
June 2021 (Special)			268
February 2022			361
February 2023			417

*February 2005 was the first-year electronic voting was used.

12.7 Association History – Record Maintenance and Retention Standards

The organization's staff, volunteers, members of the board of directors, committee members, and outsiders (independent contractors via agreements with them) are required to honor the following rules:

Permanently Retained Documents: (These records should be maintained by the Secretary)

- Articles of Incorporation
- Bylaws

- Audit Reports
- Corporate Resolutions
- Determination Letter from the IRS, and any response
- Year-End Financial Statements
- Minutes of Board Meetings
- Minutes of Annual Meeting of Members
- Tax Returns and worksheets
- Correspondence (legal and critical matters)
- Insurance Records, current accident reports, claims, and any active policies

Temporarily Retained Documents:

1. Treasurer Records - Certain fiscal records and documentation of the Treasurer are to be retained. To minimize the cost associated with transferring hard copies of records as well as the possible destruction of hard copies due to natural disasters (fire, tornado, flooding, etc.), it is strongly encouraged that the following financial records are maintained in an electronic/imaged format. In the event imaged format is not possible, the following documents must be maintained in hard copy format. The treasurer is to maintain the following financial records and should make these records available for financial review upon request:

- Bank statements
- Cancelled and voided checks
- Deposit slips
- Credit Card Statements & Usage Agreements
- Expense reports and supporting documentation
- Invoices
- Certificate of deposits and other investment papers
- Credit card payment receipts

2. Budget & Finance Records – Imaging should occur as soon as possible but must precede the transfer of records between B&F Chairs at the end of the fiscal year

- Financial review or financial review reports
- BOD - Conflict of Interest Agreements
- BOD – Rules of Engagement

General records that do not support specific financial transactions may be destroyed at the end of the second fiscal year after the financial review (based on the discretion of the B&F Committee).

3. Membership and conference registration forms will be retained in the membership database no less than 5 years but as long as reasonably possible based on electronic storage

Document Destruction

- All other organizational and business records (non-permanent, non-financial and non-membership) electronic documents can be deleted from all individual computers, data bases, networks, and backup storage after three years (three historical years and one active year)
- No paper or electronic documents will be destroyed or deleted if pertinent to any ongoing or anticipated government investigation or proceeding or private litigation (check with legal counsel or the human resources department for any current or foreseen litigation if employees have not been notified); and
- No paper or electronic documents will be destroyed or deleted as required to comply with government auditing standards (Single Audit Act).

Appendices

Appendix A: Certificates of Exception, Logo, Meeting Minutes

A.1 Attachment – Certificates of Exemption

Exemption status in the nine SASFAA states is as follows:

- Alabama - Not Exempt (Current state law prohibits)
- Florida – See certificate below (expires 3/31/2023)
- Georgia - Not Exempt (Current state law prohibits)
- Kentucky - Not Exempt
- Mississippi - Not Exempt
- North Carolina – SASFAA pays the taxes and then files a claim for a refund with the North Carolina Department of Revenue. The form can be found at www.dornrc.com.
- South Carolina - Not Exempt (Current state law prohibits)
- Tennessee - See certificate below
- Virginia - Not Exempt (Current state law prohibits)

0000011 03/20/18



Consumer's Certificate of Exemption

Issued Pursuant to Chapter 212, Florida Statutes

DR-14
R. 01/18

85-8012664838C-5	03/14/2018	03/31/2023	501(C)(3) ORGANIZATION
Certificate Number	Effective Date	Expiration Date	Exemption Category

This certifies that

SOUTHERN ASSOCIATION OF STUDENT
FINANCIAL AID ADMINISTRATORS INC
1 UNIVERSITY RD
PEMBROKE NC 28372-8699

is exempt from the payment of Florida sales and use tax on real property rented, transient rental property rented, tangible personal property purchased or rented, or services purchased.



Important Information for Exempt Organizations

DR-14
R. 01/18

1. You must provide all vendors and suppliers with an exemption certificate before making tax-exempt purchases. See Rule 12A-1.038, Florida Administrative Code (F.A.C.).
2. Your *Consumer's Certificate of Exemption* is to be used solely by your organization for your organization's customary nonprofit activities.
3. Purchases made by an individual on behalf of the organization are taxable, even if the individual will be reimbursed by the organization.
4. This exemption applies only to purchases your organization makes. The sale or lease to others of tangible personal property, sleeping accommodations, or other real property is taxable. Your organization must register, and collect and remit sales and use tax on such taxable transactions. Note: Churches are exempt from this requirement except when they are the lessor of real property (Rule 12A-1.070, F.A.C.).
5. It is a criminal offense to fraudulently present this certificate to evade the payment of sales tax. Under no circumstances should this certificate be used for the personal benefit of any individual. Violators will be liable for payment of the sales tax plus a penalty of 200% of the tax, and may be subject to conviction of a third-degree felony. Any violation will require the revocation of this certificate.
6. If you have questions about your exemption certificate, please call Taxpayer Services at 850-488-6800. The mailing address is PO Box 6480, Tallahassee, FL 32314-6480.



STATE OF TENNESSEE
DEPARTMENT OF REVENUE
ANDREW JACKSON STATE OFFICE BUILDING
NASHVILLE, TENNESSEE 37242

SOUTHERN ASSO. STUDENT FINANCIAL
AID ADMINISTRATORS, INC.
1800 BUENA VISTA RD
COLUMBUS, GA 31906

EM

EXEMPTION NO. 4-991937662-000-9

EL

SOUTHERN ASSO. STUDENT FINANCIAL
AID ADMINISTRATORS, INC.
1800 BUENA VISTA RD
COLUMBUS, GA 31906

Under the provisions of T.C.A. Section 67-6-322, this will provide authority from the Tennessee Department of Revenue for the organization named above to make purchases of tangible personal property or taxable services for their own use and consumption or to be given away without the payment of sales or use tax.

The organization must furnish the suppliers of goods and services with a COPY of this letter properly completed below. YOU MUST RETAIN THE ORIGINAL FOR COPY PURPOSES. The supplier will maintain a file copy as evidence of exemption. Later purchases do not require the submission of a letter. The invoices should contain the name of the organization and the number given above.

This authority does not extend to purchases made by employees of the organization when employees pay for items purchased or services rendered with personal funds. It does not extend to items purchased to be resold.

THE ORGANIZATION MUST NOTIFY THE DEPARTMENT IMMEDIATELY IF IT CEASES TO EXIST, MOVES, OR IN ANY WAY CHANGES THE ORGANIZATION FROM ITS PRESENT FORM.

MAR 09 1993

DATE _____ COMMISSIONER OF REVENUE

TO BE COMPLETED BY THE ORGANIZATION (please print)

TO: SUPPLIER'S NAME _____
ADDRESS _____
CITY _____ STATE _____ ZIP _____

I, _____ as an authorized representative of the organization named above affirm that the purchases made under this authority will be used and consumed by the organization or given away. I further affirm that the organization will not use this authority to purchase items for resale.

Under penalty of perjury, I affirm this to be a true and correct statement.

PRINT NAME OF ORGANIZATION: _____

PRINT NAME OF PURCHASER: _____

SIGNATURE OF PURCHASER: _____ DATE: _____

1901 (Rev. 8-89)

A2. Attachment – SASFAA Logo



A.3 Attachment – Minutes of First Organizational Meeting

SASFAA - Minutes of First Annual Meeting - CONTINUED;

Secretary - Treasurer

Guy E. Snavely, Jr.
Executive Vice-President
Pickett and Hatcher Educational Fund

The Constitution and By-Laws Committee was composed of Jack E. McGraw, Pickett and Hatcher Educational Fund; L.W. Davis, Tuskegee Institute; and Walter Conn, University of Southern Mississippi, and was requested to present a Constitution and a set of By-Laws to be considered at the next meeting.

It was agreed that membership would be on an individual basis and that the dues would be \$3.00 a year.

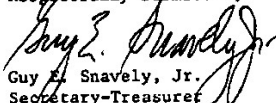
The following were appointed by President Carr to serve as a Membership Committee:

Kingston Johns, North Carolina State College	CHAIRMAN
John F. Dunlap, Auburn University	ALABAMA
Sam J. Baptista, Florida Atlantic University	FLORIDA
Mac Grigsby, University of Florida	
Jack Henderson, LaGrange College	GEORGIA
A.J. Thurman, Western Kentucky State College	KENTUCKY
Andrew J. Bond, Mississippi State University	MISSISSIPPI
Kenneth L. Wooten, University of Mississippi	
Julian D. Mason, Jr., University of N.C. at Chapel Hill	NORTH CAROLINA
Duffy L. Paul, Executive Secretary, College Foundations, Inc., Raleigh	NORTH CAROLINA
Dorman G. Stout, Furman University	SOUTH CAROLINA
Cannon R. Mayes, Vanderbilt University	TENNESSEE
John Eubanks	
Lewis G. John, Washington & Lee University	VIRGINIA

President Carr expressed his appreciation to those who had provided so much assistance in connection with making arrangements for the initial meeting that was nearing a close and paid special tributes to Kingston Johns, who started his work on membership and attendance during the summer of 1963, and to Charles W. Hill, who arranged the program and served as the leader of the committee for local arrangements.

The meeting was adjourned after it was unanimously decided that the next meeting would be held preceding the next meeting of the Southern Region of CEEB in Atlanta, Georgia, in February, 1965.

Respectfully submitted,


Guy E. Snavely, Jr.
Secretary-Treasurer

SASFAA - Minutes of First Annual Meeting - CONTINUED;

Secretary - Treasurer	Guy E. Snavely, Jr.
	Executive Vice-President
	Pickett and Hatcher Educational Fund

The Constitution and By-Laws Committee was composed of Jack E. McGraw, Pickett and Hatcher Educational Fund; L.W. Davis, Tuskegee Institute; and Walter Conn, University of Southern Mississippi, and was requested to present a Constitution and a set of By-Laws to be considered at the next meeting.

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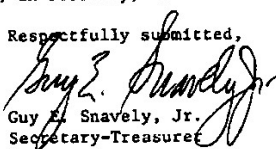
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The meeting was adjourned after it was unanimously decided that the next meeting would be held preceding the next meeting of the Southern Region of CEEB in Atlanta, Georgia, in February, 1965.

Respectfully submitted,


Guy E. Snavely, Jr.
Secretary-Treasurer

Appendix B: SASFAA Governing Documents

The following documents are maintained by the SASFAA Secretary and can be found on the [SASFAA website](#).

All officers and committee chairs are responsible for the identifying areas below in need of new or revised policy guidance or procedural change and for recommending appropriate changes.

The Board must approve all new policies, procedures, and changes. Upon approval, the Secretary is responsible for incorporating the changes and working with the SASFAA Electronic Service Chair to update the documents on the web.

- Articles of Incorporation
- Bylaws

Appendix C: SASFAA Maintained Documents List

The following documents are maintained by the SASFAA Secretary and can be referenced on the [SASFAA website](#).

All officers and committee chairs are responsible for the identifying areas below in need of new or revised policy guidance or procedural change and for recommending appropriate changes.

The Board must approve all new policies, procedures, and changes. Upon approval, the Secretary is responsible for incorporating the changes and working with the SASFAA Electronic Services Chair to update the documents on the web.

- SASFAA Guide to Financial Management
- SASFAA Long-Range Plan
- SASFAA Summer Workshop Guide
- SASFAA Conference Planning Guide
- SASFAA Operational Calendar
- SASFAA Conflict of Interest Policy
- SASFAA Organizational Chart
- SASFAA Confidentiality Acknowledgement
- SASFAA Standing Rules of Engagement & Protocols
- SASFAA Corporate Credit Card Usage Form

Appendix D: Sponsorship Opportunities

Leadership Level	\$3,500 <ul style="list-style-type: none"> • Two Exhibit Booth Spaces - Priority Placement by date of receipt of commitment • Must be paid SASFAA Members • Two Complimentary Conference Registrations • Lunch & Learn Session at the Annual Conference (space is limited to first 6 commitments) • Breakout Session Moderator • Inclusion in Product and Services Directory • Organization Logo on Conference Information Page • On-Line Conference Support Recognition • Sponsorship Recognition at Conference • SASFAA Director's Forum Admission • Web Banner Ad on Web Site • Full Page Ad in Management Institute Program • Full Page Ad in New Aid Officers Workshop Program • Full Page Ad in Conference Program • Recognition at all SASFAA Workshops and Professional Development Activities • List of Registrants 2 weeks prior to Annual Conference • General Session Moderator • One Complimentary Management Institute Admission
Advocacy Level	\$2,500 <ul style="list-style-type: none"> • Conference Exhibit Booth - Priority Placement by date of receipt of commitment • Must be paid SASFAA Members • Two Complimentary Conference Registrations • Organization Logo on Conference Information Page • On-line Conference Support Recognition • Breakout Session Moderator • Inclusion in Product and Services Directory • Sponsorship Recognition at Conference • SASFAA Director's Forum Admission • Web Banner Ad on Web Site • 1/2 Page Ad in Management Institute Program • 1/2 Page Ad in New Aid Officers Workshop Program • 1/2Page Ad in Conference Program • List of Registrants 2 weeks prior to Annual Conference
Support Level	\$1,500 <ul style="list-style-type: none"> • Conference Exhibit Booth - Priority Placement by date of receipt of commitment • Must be paid SASFAA Members • One Complimentary Conference Registration • Organization Logo on Conference Information Page • On-line Conference Support Recognition • Breakout Session Moderator • Inclusion in Product and Services Directory

	<ul style="list-style-type: none"> • Sponsorship Recognition at Conference • List of Registrants 2 weeks prior to Annual Conference
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A-La-Carte Sponsorship Opportunities

Advertising Combo Package	\$600 <ul style="list-style-type: none"> • Web Banner Ad on SASFAA Website • Includes 1/2-page ad Management Institute Program • Includes 1/2-page ad in New Aid Officers Workshop Program
President's Reception	\$1500 <ul style="list-style-type: none"> • Must be a conference exhibitor • Sponsor will be recognized with signage at the of event • Special recognition will be given at the event – possible table tents or other Promotional material • Space limited to the first 2 commitments. Those wishing to purchase this opportunity will be honored in order of the date the web-based sponsor form is completed.
Continental Breakfasts	\$500 <ul style="list-style-type: none"> • Must be a conference exhibitor • Sponsor will be recognized with signage where food is being served • Additional special recognition will be given at any general sessions offered each day • Space limited to the first 2 commitments. Those wishing to purchase this opportunity will be honored in order of the date the web-based sponsor form is completed.
Tuesday's Award Luncheon	\$1,000 <ul style="list-style-type: none"> • Must be a conference exhibitor • Sponsor will be recognized with signage where food is being served • Special recognition at the event • Space limited to the first 2 commitments. Those wishing to purchase this opportunity will be honored in order of the date the web-based sponsor form is completed.
Entertainment Sponsor	\$1,500 <ul style="list-style-type: none"> • Must be a conference exhibitor • Sponsor will be recognized with signage where food is being served • Special recognition at the event • Space limited to the first 2 commitments. Those wishing to purchase this opportunity will be honored in order of the date the web-based sponsor form is completed.

Payment and registration information is available on the [Sponsorship Registration](#) page.

Select "Sponsorship: Advertising Opportunities" option.