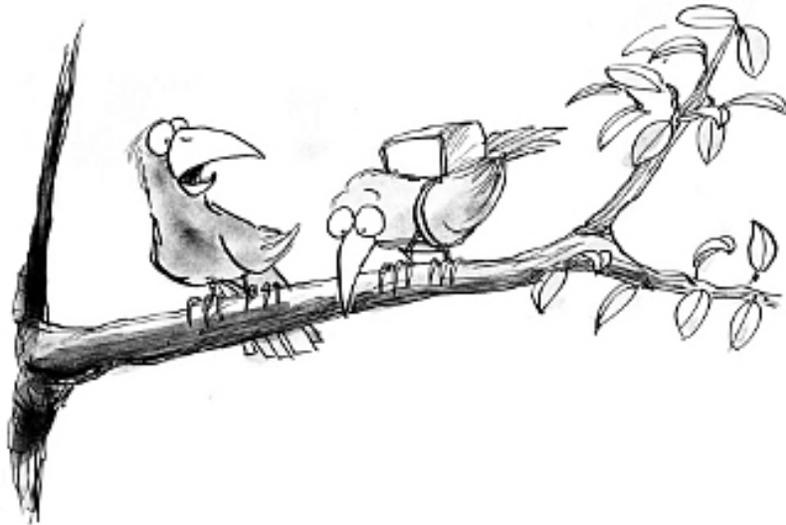




# **State President's Guide Book**

**What you need to know about serving on the  
SASFAA Executive Board  
And General Information.**

This handbook project began in 2015-2016. The 2015-16 SASFAA State Presidents created the first draft. The project resumed in 2016-2017. The elected 2016-17 SASFAA State Presidents submitted a completed version at the February 2017 board meeting.



**Let's try it once without the parachute.**

**An investment in knowledge always pays the best interest.**

*Benjamin Franklin*

SASF AA is comprised of nine states. Each state has Bylaws and Policy and Procedures for the President's role and association governance. This guide is provided to help with transition to your role on the SASF AA Executive Board.

## **Table of Contents**

- 1) What is Expected of You from SASFAA
- 2) SASFAA Board Meetings
- 3) SASFAA Projects
- 4) State President Exchange
- 5) SASFAA Conference in Your State
- 6) NASFAA Leadership Conference
- 7) NASFAA Listserv
- 8) NASFAA State and Regional Presidents Breakfast
- 9) Travel Reimbursement Guidelines
  - a. SASFAA Financial Support
  - b. State Association Financial Support
- 10) Tips and Advice

## **What is expected of you from SASFAA?**

Your participation with SASFAA is crucial, and it begins with your term as state president-elect. The SASFAA president-elect will conduct a workshop for all state presidents-elect at the annual SASFAA conference. This workshop is a great opportunity to learn more about your upcoming role as a voting member of the SASFAA Board and an even better opportunity to get to know the other state presidents from the region. You will work together closely as presidents, so group cohesion is important.

Once your term as state association president begins, you are officially a member of the SASFAA Board. Your active participation in the governance of the regional association is important. You may feel intimidated at first if you have never served on the SASFAA Board, or you may feel like you are “just” a state president filling a seat. You will learn quickly that the elected officers and committee chairs of SASFAA work together much like the members of your own Board at the state level, and that they are welcoming of all those who are new to service at the regional level. More importantly, you will learn that they really do want to hear your input and ideas as a state president and that your participation is crucial to the success of the SASFAA Board.

### **SASFAA Board Meetings:**

Attend every SASFAA board meeting. If you cannot attend, it is your responsibility to find and send a replacement for voting purposes. Consider sending your state’s president-elect if your attendance is not possible. This would be a great learning opportunity for the president-elect. Participate in discussions that take place with the state presidents and SASFAA Executive Board. Board meetings are more *fun* if you participate and bring different opinions to the table. Use your voting privileges! If you do not agree with something, do not vote the same as the others just to “keep the peace.” Be professional. You represent not only your state association, but regional and national associations. At all times, remember that you are to uphold the associations and maintain your professionalism.

You will be required to provide a written Board report (state update) prior to each SASFAA Board meeting. A template for your report will be provided by the SASFAA secretary. Be prepared to present highlights from your report during each meeting as an official agenda item. You may also be asked to provide a state report to the SASFAA president at other times throughout the year.

### **SASFAA Projects:**

The group of nine state presidents may be asked to work together on a special project during the year. This is a good way to get the state presidents more involved and for the group to have more input concerning the needs of SASFAA.

### **State President Exchange:**

The state presidents group may also wish to coordinate a conference exchange program in which the state presidents (or designee) attend another state's conference. This is not mandatory but has been done many times in the past. The conference exchange offers each state president (or designee) an opportunity to see how another state's conference is organized, a chance to meet colleagues in another state, and a possible opportunity to present a concurrent session at the request of the host state. If a conference exchange program is agreed to, it is customary for the host state to offer a complimentary registration and hotel room to the visiting state president. Travel expenses to and from the other state conference, and any meals not provided during that state's conference, are the responsibility of your state association.

### **SASFAA Conference in Your State:**

If, during your Presidency, a SASFAA Board meeting or the SASFAA conference is held in your state, be prepared for additional duties. For Board meetings, you will be responsible for providing an official welcome to the Executive Board at the beginning of the meeting, which may include a small gift representative of your state for each Board member. If the SASFAA conference is held in your state during your Presidency, your duties will be much more extensive. You may be asked to provide an official welcome to the conference attendees and to host a hospitality suite at the conference hotel, among other duties as requested by the SASFAA Conference Chair and President.

### **NASFAA Leadership Conference:**

SASFAA State Presidents are encouraged to attend the NASFAA Leadership Symposium held in Washington DC. In addition to networking with fellow SASFAA Presidents, those attending this event can select from the following four targeted pathways, providing attendees a deep dive into their chosen topic. SASFAA strongly recommends you attend the Association Management though you would need to check with your state association to determine their requirements.

- New & Aspiring Directors Pathway
- Association Management Pathway
- Fundamentals of Enrollment Management Pathway
- Strategic Enrollment Management Pathway

During that conference you will be asked to participate in Capitol Hill visits as part of the NASFAA Legislative Symposium. NASFAA will provide information regarding this process and typically offers a webinar to assist you in preparing for your Hill visits. During your visit to Capitol Hill, you will meet with House or Senate representatives or staffers from your state and advocate for federal student aid programs and issues. You are not required to have experience with legislative relations or any other special experience in order to have a successful Hill visit.

Feel free to ask previous SASFAA Presidents or designated members of the NASFAA staff for advice if necessary.

Your state association will be responsible for all expenses associated with this conference. That includes the conference fee, hotel, travel and meals.

### **NASFAA Listserv:**

The NASFAA Leadership Listserv is an email discussion list for state and regional association leaders, including presidents, vice-presidents, presidents-elect, etc. The listserv is frequently used to deliver critical information about association events and important policy and regulatory updates. NASFAA uses the list of state and regional leaders as an informal focus group of financial aid administrators from across the nation, on topics usually related to federal policy or regulation. From time to time, NASFAA holds webinars or policy briefings specifically for this group of leaders.

Each elected State or regional officer should submit his/her contact information to NASFAA via the following link, [https://www.nasfaa.org/submit\\_state\\_regional\\_president\\_listing](https://www.nasfaa.org/submit_state_regional_president_listing). Once submitted, you will be automatically subscribed to the listserv. The current SASFAA President or your current state president can also provide the instructions for joining the listserv.

### **NASFAA State and Regional Presidents Breakfast:**

NASFAA works in partnership with regional and state associations of financial aid administrators to deliver excellence in student aid administration. While NASFAA works at the national level, state and regional associations play an important role in advocating for and serving students in their communities. The State and Regional Presidents' Breakfast provides one venue for networking and collaboration. This breakfast is held at the annual NASFAA conference.

Your state association or your school will be responsible for all expenses associated with this conference.

## **Travel Reimbursement Guidelines:**

- SASFAA covers the following:
  - Hotel costs for board meetings
  - Any meals incurred from the time the board meeting begins until conclusion
  - Travel to and from board meetings. Note - the policy associated with driving is that reimbursement will not be more than what plane fare would have cost the association.
  
- State Association covers the following:
  - Actual travel costs (flight, mileage) to the SASFAA Conference, NASFAA Conference, NASFAA Leadership Conference
  - Any meals incurred while traveling

## **Tips and Advice:**

Your relationship with the other state presidents will be more important than you realize, so make it a good one. You will form a “sub-group” of the SASFAA Board with them, and they will become a tremendous asset in your growth as a leader.

Most state association members who serve as President are planners by nature. One thing learned quickly is that you can plan out your year as President to the last detail and have a number of great ideas to implement, but it is very likely that your year will not pan out exactly as you had planned. All of your suggestions will not be implemented, all of your ideas will not be executed, and all of your planned changes and initiatives may not make it into the P&P Manual. More importantly, it’s **OKAY** when your year does not go as planned. Being adaptive and being able to “roll with the punches” are necessary skills and creates tremendous opportunity for professional growth.

You do not control the actions of your Executive Board members, and you can’t do their jobs for them. Set clear expectations. Provide a positive example. Give advice when asked. Then delegate and let the chips fall where they may, swooping in to save the day only when absolutely necessary.

Your job as state president is just that – a job (a volunteer job for which you won’t get paid, but will learn from and love nonetheless). Your Presidency becomes a second job because of the time-consuming nature of the position. Being prepared for that reality upfront may help you better juggle the demands and prioritize your tasks accordingly.

Prepare to become an expert at putting out fires (if you already aren't)!

Ask Past-Presidents their advice if there is a situation to handle and keep the President-Elect advised of things happening with the board and the association.

**Welcome & Enjoy the Experience!**

