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Mississippi Association of Student Financial Aid Administrators

**Mission Statement**  
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**Updated November 15, 2012**



# **MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INCORPORATED**

## **Mission Statement**

The Mississippi Association of Student Financial Aid Administrators, Inc. was founded to establish a financial aid community that encourages the exchange of ideas and professional expertise to effectively and ethically promote access to higher education by meeting the diverse needs of our constituents (students, parents, and institutions).

To achieve our mission, MASFAA provides training opportunities for financial aid professionals, provides an atmosphere to develop networking and professional relationships, serves as liaison between federal and state authorities and the financial aid community regarding student financial assistance and educational access, and enhances public awareness of student financial aid assistance.

## **Vision Statement**

The Mississippi Association of Student Financial Aid Administrators, Inc. is a vibrant organization serving students, parents, and institutions. Through the coordination of plans and programs pertinent to student financial aid, MASFAA serves the interests and needs of students, postsecondary educational institutions and their aid administrators, and public and private agencies and organizations concerned with student financial aid.

By the administration of these plans and programs, MASFAA has an absolutely amazing impact on the lives of people who desire to achieve a higher education but believe it is impossible due to financial constraints.

**MISSISSIPPI ASSOCIATION  
OF STUDENT FINANCIAL AID ADMINISTRATORS, INCORPORATED**

**CONSTITUTION**

**Article I - Name**

The name of this organization shall be the Mississippi Association of Student Financial Aid Administrators, Inc. (MASFAA).

**Article II - Purpose**

The purpose of this Association will be:

- A. To promote the professional competency, and association of student financial aid administrators in colleges, universities, government agencies, foundations, and others associated with private and community organizations concerned with the support and administration of student financial aid programs.
- B. To assist educational institutions, foundations, government agencies, and private and community organizations to promote and develop effective programs pertinent to student financial aid.
- C. To facilitate communication between educational institutions and sponsors of student financial aid funds through an exchange of ideas, information and experiences.
- D. To promote such systematic studies, cooperative experiments, conferences and other related activities as may be desirable or required to fulfill the purpose of this Association.

**Article III - Membership**

Membership in this Association shall consist of active members, as defined in the By-Laws.

**Article IV - Officers**

The administrative responsibility of this Association shall be vested in a Board of Directors as defined in the By-Laws. The elected officers of the Association shall be President, President-Elect, Vice-President, Secretary, Treasurer, Member-at-Large, Immediate Past-President, and three Directors.

**MISSISSIPPI ASSOCIATION  
OF STUDENT FINANCIAL AID ADMINISTRATORS, INCORPORATED**

**BY-LAWS**

**Article I - Name**

- A. The name of this organization will be the Mississippi Association of Student Financial Aid Administrators, Incorporated (MASFAA).
- B. The address of the Association is the Office of Financial Aid, Millsaps College, 1701 North State Street, Jackson, MS 39210.
- C. The Registered Agent for the Association is the Secretary of MASFAA.

**Article II - Purpose**

The purpose of this Association will be:

- A. To promote the professional competency, and association of student financial aid administrators in colleges, universities, government agencies, foundations, and others associated with private and community organizations concerned with the support and administration of student financial aid programs.
- B. To assist educational institutions, foundations, government agencies, and private and community organizations to promote and develop effective programs pertinent to student financial aid.
- C. To facilitate communication between educational institutions and sponsors of student financial aid funds through an exchange of ideas, information and experiences.
- D. To promote such systematic studies, cooperative experiments, conferences and other related activities as may be desirable or required to fulfill the purpose of this Association.

**Article III - Membership**

- A. MEMBERS: Members of the Association will consist of persons associated with colleges, universities, lending institutions, government agencies, foundations and others associated with private and community organizations concerned with the support and administration of student financial aid programs. These members will

be approved by the Board of Directors, and will pay the annual dues in accordance with the regulations for payment of dues as established by the Board of Directors.

- B. TYPE OF MEMBERSHIP: Membership is individual rather than institutional.
- C. HONORARY LIFETIME MEMBERSHIP: Honorary lifetime members will be persons who have performed outstanding service in the field of support and/or administration of student financial aid, and who have made significant contributions to the Association and are not current members of the Association. Candidates for honorary lifetime membership shall be recommended by the Board of Directors and approved by majority vote of the Association.

#### **Article IV - Board of Directors**

- A. BOARD OF DIRECTORS: The administrative responsibilities of the Association will be vested in a Board of Directors, composed of the elected officers of the Association. The officers of the Association will consist of a President, Vice-President, President-Elect, Immediate Past-President, Secretary, Treasurer, one Member-at-Large, and three Directors.
- B. ELECTIONS AND TERM OF OFFICE: The officers of the Association will be elected at the Annual Business Meeting. The President-Elect will serve one year in that position, the second year as President and the following year as Immediate Past-President. The Vice-President will serve for one year. The Secretary, the Treasurer and the Member-at-Large will serve for periods of two years; the Secretary and the Member-at-Large to be elected in odd years, the Treasurer to be elected in even years. The Directors are elected to three-year terms, with one Director elected each fiscal year. All terms of office will coincide with the fiscal year of the Association as defined in Article V.
- C. VACANCIES: In the event of a vacancy in the President's office, the Vice-President will succeed to that office. Except for the office of President-Elect, other vacancies will be filled by the President with the approval of the Board of Directors. When a vacancy occurs in the President-Elect's position, that office will remain vacant until such time as a special election can be held. The President will assume the duties of the President-Elect's position until a special election is held.
- D. REMOVAL FROM OFFICE: Officers may be removed from office for misconduct, failure to perform the duties of the office, exiting the profession, or for other just causes as determined by the Board. The officer being considered for removal will be notified in writing by the Secretary that such action is pending. The Board, in executive session, will consider the charges, review the evidence presented by all parties, and reach a decision. A two-thirds vote of the Board is necessary for removal from office. The decision of the Board will be final. The President will preside over the proceedings unless the President is being considered for removal

from office. In that event, the Vice-President will preside. Parties may be represented by counsel. The Secretary, or designee, will record and transcribe all testimony. The presiding officer will provide a summary of the action of the Board to the membership at the next regularly scheduled meeting or through the Association's newsletter or listserv. Vacancies created through this action will be filled in the manner prescribed in Article IV, Section C of these by-laws.

### **Article V – Fiscal Year**

The fiscal year of the Association begins on July 1 of each calendar year and ends on June 30 of the following calendar year.

### **Article VI - Duties of the Board of Directors**

- A. The President is the Chief Executive Officer of the Association. The President will:
1. Preside at all meetings of the Association;
  2. Serve as Chairperson of the Board of Directors;
  3. Appoint all chairpersons and members of the committees unless otherwise provided for in the By-Laws or voted by the Board of Directors;
  4. Serve as ex-officio on all committees;
  5. Authorize expenditures and have the authority, in addition to the Treasurer, to pay bills of the Association;
  6. Report to the membership on actions of the SASFAA Regional Council;
  7. Submit an Annual Report to the Board of Directors and the Association.
- B. The President-Elect is the assistant to the President. The President-Elect will:
1. Perform all duties designated by the President;
  2. Perform such other duties and functions as may be required by the Association;
  3. Serve as MASFAA Newsletter Editor;
  4. The President-Elect has the authority to appoint a person(s) to serve as Conference Chair during the President-Elect's term of Presidential office. In the event this appointed person is unable to fulfill the duties of the Conference Chair position, the President-Elect (or if then President) shall appoint a person(s) to this position.
- C. The Vice-President is the training coordinator of the Association. The Vice-President will:
1. Be responsible for all training programs of the Association, including workshops for new aid officers, advanced level seminars, and any other training sessions required by the Association;

2. Coordinate training efforts of the Association with those of the Regional Association and the National Association;
3. Serve on such other committees as appointed;
4. Perform all duties of the President in the absence of that officer;
5. Succeed to the office of the President in the event of a vacancy in that office;

D. The Immediate Past-President is an assistant to the President. The Immediate Past-President will:

1. Serve as Chairperson of the MASFAA Nominating Committee;
2. Serve as the MASFAA representative to the SASFAA Nomination Committee;
3. Serve as Chairperson of the Planning Committee.
4. Act as Parliamentarian for Board Meetings and associated meetings;

E. The Secretary is the scribe of the Association and the custodian of its records. The Secretary will:

1. Record and maintain minutes of the Board of Directors and of the Association;
2. Receive copies of the official annual membership list, the official list of the Board of Directors members, the proceedings of each meeting of the Association, and all workshop, project and committee reports;
3. Upon completion of each fiscal year, provide all items listed in #2 to archives committee chair within 30 days.
4. Be responsible for maintaining the Constitution and By-Laws of the Association and the Association's Policies and Procedures Manual.

F. The Treasurer is the finance officer of the Association. The Treasurer will:

1. Receive all Association monies and keep the books of the Association;
2. Pay the bills of the Association within 30 days of authorization by the President;
3. Arrange for the billing and collection of dues of the Association upon direction of the Board of Directors;
4. Be responsible for conducting all on site registrations with the assistance of the Member-at-Large;
5. Arrange for collection of the registrations for meetings of the Association;
6. Prepare and maintain an annual budget for the Association, in consultation with the President, by soliciting input of the elected officers and committee chairs and, as needed, the Past-Treasurer;
7. Submit an annual report within 30 days of the close of the fiscal year;
8. Upon the completion of the term of office, turn over to the new Treasurer, within 60 days after the close of the fiscal year, all financial records of the Association;
9. Be bonded at the expense of the Association;
10. Must file the 990P form annually in accordance with IRS regulations.

G. The Member-at-Large serves as Membership Coordinator for the State, Regional, and National Associations. The Member-at-Large will:

1. Be responsible for maintaining the membership list in coordination with the Treasurer and filing with the Secretary;
2. Perform other duties and functions as designated by the President;
3. Serve as ex-officio of the Electronic Services Committee;
4. Assist the Treasurer with conducting on-site registration at all meetings.

H. The Directors will:

1. Attend all Board of Directors meetings as called by the President;
2. Serve as the Planning Committee and be responsible for reviewing and recommending revisions to the Constitution and By-Laws of the Association and the Association's Policies and Procedures Manual.

### **Article VII - Voting**

A. In a business meeting or mail-out ballot, a 2/3 majority of members voting is required to amend the following:

1. Constitution – requires a 2/3-majority vote from the membership;
2. By-Laws – requires a 2/3-majority vote from those members in attendance at a Business Meeting of the Association.

B. A vote may be taken in any regular or special called meeting of the Association or conducted by mail or electronically with appropriate prior notice being given.

C. Only active (paid) members shall be entitled to vote in any meeting of the Association or any vote conducted by mail or electronically, where appropriate prior notice has been given.

D. Active paid members may cast absentee ballots in accordance with the Association's Policies and Procedures Manual.

E. In the event of a tie vote during the election of officers, the Chairperson of the Nominating Committee will immediately notify the President of the Association who will immediately call a meeting of the Board of Directors who will be polled, by secret ballot, to determine the outcome.

## **Article VIII - Committees**

The President may appoint committees as are deemed necessary in order to conduct the Association's business, and unless specified elsewhere in these By-Laws, designate the chairperson of such committees. The President may also appoint other persons as deemed necessary to conduct business.

- A. All Committee members must be paid members of the Association for the year in which they serve.
- B. The Nominating Committee: The Nominating Committee is responsible for providing a slate of candidates to be voted on at the Annual Conference. The Nominating Committee will be composed of the Immediate Past-President, who serves as chair, and the four most recent Past-Presidents of the Association. In the event that one of the four most recent Past-Presidents cannot serve or is no longer an active member, the Chair will appoint another active Past-President to the committee if available.
- C. Audit/Finance Committee: The Audit/Finance Committee is responsible for performing a review or for causing a review to occur, in a manner prescribed by the Board of Directors, of the MASFAA checking account and financial records annually, evaluating liability and insurance policies, evaluating employee dishonesty bond, and making recommendations to the Board for investments and excess funds in the checking account. The President appoints the Audit/Finance Committee chair.
- D. Diversity Committee: The Diversity Committee is responsible for raising the awareness of MASFAA of the value of diversity and how the organization can benefit from diversifying. The Diversity Committee recommends speakers, presenters, and resources on diversity for training events and the Annual Conference. The President appoints the Diversity Committee chair.
- E. Planning Committee: The Planning Committee is responsible for establishing a five-year plan to be continuously built upon. The Planning Committee will systematically explore and work toward future opportunities, while analyzing and avoiding threats to the organization. The Planning Committee will make recommendations to the Board on issues as requested by the members, as well as issues of immediate or long range concerns. The Planning Committee will review and make recommendations to the Board for revisions to the Association's Constitution, By-Laws, and Policies and Procedures Manual. The Planning Committee is composed of the Directors and the Immediate Past-President who serves as chair.
- F. Training Committee: The Training Committee is responsible for all education and training programs, events and professional development of the Association. The Vice-President serves as chair.

- G. Conference Committee: The Conference Committee will be responsible for planning and conducting the Annual Conference. Other committees that function in support of the Conference Committee can be Program Committee, Local Arrangements Committee, and Site Selection Committee. The Conference Chair, in collaboration with the President, will determine the makeup of supporting committees. The President appoints the Conference Committee chair.
  
- H. Electronic Services Committee: The Electronic Services Committee will be responsible for all electronic services and initiatives of the Association including the Association's listserv and Web site. The President appoints the Electronic Services Committee chair.
  
- I. High School Relations Committee: The High School Relations Committee is responsible for all Association educational and outreach activities aimed at high school students in Mississippi. The President appoints the High School Relations Committee chair.

**MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS  
POLICIES AND PROCEDURES  
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MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Policies and Procedures Manual

CODE NO: 1-1

1. The purpose of this manual is to set forth the philosophy, policies and procedures of the Mississippi Association of Student Financial Aid Administrators.
2. It is the responsibility of the Planning committee to annually review and recommend any changes to the Policy and Procedures Manual to the Board of Directors.
3. The Planning Committee will work with standing committees and other committees appointed by the President to review the Policy and Procedures Manual.
4. All proposed changes to the Policies and Procedures Manual must be approved by a majority vote of the Board of Directors.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Voting Members of the Board of Directors

CODE NO: 1-2

1. Voting members of the MASFAA Board of Directors shall consist of the President, President-Elect, Vice-President, Secretary, Treasurer, Immediate Past-President, Member-at-Large, and three Directors. A quorum will be no less than six members of the Board of Directors.
2. All voting members of the MASFAA Board of Directors must be paid members of the Mississippi Association of Student Financial Aid Administrators, Inc.
3. Invited guests, e.g. committee chairs or liaison representatives, may attend meetings of the Board of Directors, enter into discussions, and make presentations, but shall not have voting privileges.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Records

CODE NO: 1-3

Each officer and committee chair shall pass on to his/her successor all pertinent records and reports by August 1. In the event of resignation or removal from office, all records must be submitted to the Secretary of the Association within 30 days.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Honorary Lifetime Membership Award

CODE NO: 1-4

1. Honorary Lifetime Membership awards should be made only to those individuals who have made significant contribution to the Mississippi Association of Student Financial Aid Administrators and who have performed outstanding service in the field of support and/or administration of student financial aid.
2. Honorary lifetime membership in the Association shall be made through recommendation to the Board of Directors prior to the Fall Training Event.
3. Nominees cannot be current members of the Association.
4. The Board of Directors must be unanimous in their vote to accept the recommendation.
5. The membership will vote on any honorary lifetime member at Fall Training Event.
6. Honorary Lifetime Membership awards will be presented at the Annual Conference.
7. The Board of Directors will choose a commemorative item (e.g., plaque, paperweight) to be presented to the honoree with the following inscription:

Mississippi Association of Student Financial Aid Administrators, Inc.

(Name of Recipient)

is hereby presented  
an  
Honorary Lifetime Membership  
in  
MASFAA

Awarded this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_\_\_\_

By the (Year-Year) Board of Directors

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Distribution of Minutes

CODE NO: 1-5

1. Board of Directors Meetings - The Secretary will prepare and distribute to the Board of Directors a copy of the minutes and all related reports within 30 days after the meeting.
2. General Business Sessions - The Secretary will prepare for publication the minutes of each general business session.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Contracts	CODE NO: 1-6
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All contracts will be signed by the President in consultation with the Board of Directors.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Vendors and Sponsors

CODE NO: 1-7

**Annual Vendor/Sponsor Offerings to be reviewed and updated annually based upon recommendations from vendor/sponsor chair, and ultimately board approval to set the annual vendor/sponsor offerings (*below is simply an example from 2011-2012 offerings post-FFELP*)**



*Early Bird Special  
Pay \$1,000 if  
commitment and  
payment are  
received by  
December 16, 2011*

**2011-12 MASFAA Training Activities  
and Advertising Opportunities  
(annual vendor and sponsor  
offerings and pricing approved  
annually by executive board vote)**

**President's Package \$1,250**

- Conference Exhibit Booth
- Online and Printed Conference Support Recognition
- ListServ Communication Capability for Products & Services
- Blog Capabilities for Articles & Company Specific Information
- Web Banner Ad for Fiscal Year
- ½ Page Ad in Fall Training Program
- ½ Page Ad in Spring Training Program

By purchasing this package, you will save \$800 on your total package versus purchasing each item individually. All items listed in the package are training activities and/or advertising opportunities.

If you prefer, you may select individual training activities and advertising opportunities for your company in an “a-la-carte” fashion. Those individual training activities and advertising opportunities are listed below with specific pricing.

## **Conference Sponsorship Opportunities**

Our annual training conference will be held May 23-25, 2012, at the Inn at Ole Miss in Oxford, Mississippi. More detailed information about registration and room reservations may be found at the conference section of our website. Information about set-up times, shipping and drayage will be sent to the primary contact listed.

The annual training conference is open to all persons located within MASFAA (Mississippi) or those doing business in the state of Mississippi. The training conference is intended to provide topical discussions and training for financial aid professionals and those persons serving financial aid professionals.

*Note: Vendors must be registered as conference exhibitors in order to distribute or market any commercial advertisements. Any vendor choosing not to exhibit may participate in and attend conference activities as a regular member as long as membership and conference registration fees are paid in accordance with MASFAA policy.*

Conference Exhibit Booth

\$ 750

- Booth, location to be determined by vendor/sponsor chair
- All exhibitors must register and pay conference registration fees in order to exhibit and attend conference activities
- Recognition of conference exhibitors will be listed in the conference program, alphabetical by company name and on the MASFAA website from the end of the conference to the end of the fiscal year. Exhibitors will be given the opportunity to opt out of this at their own discretion.

External Marketers Booth

\$ 250

- Exhibitors that do not have financial aid, post-secondary education, or higher education at the core of their mission
- All External Marketers must be approved by the vendor/sponsor chair, who has the authority to determine if the organization meets the criteria for this category
- The MASFAA Board reserves the right to refuse an External Marketer's request to exhibit at the conference
- External Marketers are not permitted to be MASFAA members
- External Marketers may not attend conference functions without paying an additional fee, which will be determined by the MASFAA Board
- Booth location will be at the discretion of the vendor/sponsor chair, with priority consideration being given to exhibitors with financial aid, post-secondary education, or higher education at the core of their mission
- External Marketers are responsible for any cost associated with vending
- Exceptions to this policy must be approved by the Vendor Activities Chair and President

## **Advertising Opportunities**

Fall Training Event Ad

\$ 200 / Full Page

- Fall Training Event will be held on Wednesday, October 12, 2011, in Meridian, MS.
- Ads are full page (up to 8 ½ x 11) and may be color or black and white
- Ad content is provided by advertiser
- Placement of ads will be at the discretion of the Vice-President

Spring Training Event Ad

\$ 200 / Full Page

- Spring Training Event will be held on Thursday, February 2, 2012, in Jackson, MS.
- Ads are full page (up to 8 ½ x 11) and may be color or black and white
- Ad content is provided by advertiser

- Placement of ads will be at the discretion of the Vice-President

#### ListServ and Blog Communications

\$ 300 for Fiscal Year

- Only with the purchase of this feature, company communications and advertisements may be placed over the MASFAA ListServ and through MASFAA Blog communications
- Communication content is provided by advertiser
- Placement of Blog communications will be at the discretion of the President-Elect / Blog Editor
- Please send digital communication copy for Blog to: [cmay1@olemiss.edu](mailto:cmay1@olemiss.edu)
- ListServ postings may be made through the MASFAA website

#### Web Banner Ads

\$ 600 for Fiscal Year

- Ads will be placed in color and content is provided by advertiser
- Placement of ads will be at the discretion of the Electronic Services Chair

#### Additional Vendor & Sponsor Information:

1. Sponsors may be billed by the Treasurer for the amount of their sponsorship commitment prior to the conference. Payment is expected prior to the conference.
2. The location of exhibit space will be determined by the Vendor/Sponsor Chairperson in coordination with the hotel/convention center staff and will be assigned based on the level of contribution by the sponsor. Exhibit space availability may vary based on each conference site.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Complimentary Rooms

CODE NO: 1-8

Complimentary rooms offered by the conference hotel will be assigned as follows:

- MASFAA President
- Individuals for whom MASFAA is responsible for paying hotel costs
- Conference Chair

Remaining complimentary rooms may be assigned by the Conference Chair in the manner that best serves the Association.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Flowers and Cards

CODE NO: 1-9

1. All requests for flowers or cards will be sent to the Member-At-Large.
2. The Member-At-Large will send the following as designated or as deemed appropriate by the President:
  - Member (illness) - Flowers or plant – not to exceed \$50.00, plus delivery, wire and taxes
  - Death of Member (Spouse, Parent, Child) - Flowers or plant – not to exceed \$75.00, plus delivery, wire and taxes
  - Wedding - Send card
  - Birth - Send card
  - Donations in lieu of flowers - maximum of \$50.00
3. Only bills approved by the Member-At-Large will be paid by the Treasurer.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: The Jack Woodward Award of Excellence

CODE NO: 1-10

1. The Jack Woodward Award of Excellence will be voted on by the Board of Directors of the Association prior to the Annual Conference, when so disposed.
2. Nominations will be solicited electronically no later than March 31<sup>st</sup> of each year from members of the Association using the following criteria:
  - A. Must be a practicing student financial aid professional. (Postsecondary Institution, Lending Institution, Guarantee Agency, etc)
  - B. Must be active in profession for at least five years prior to award year.
  - C. Must hold current membership in MASFAA.
  - D. Must be recommended by a current member of MASFAA.
  - E. Recommendations will be reviewed by the Board of Directors and evaluated on the bases of: involvement in MASFAA, leadership, knowledge, expertise, cooperation, professionalism, commitment, and service.
  - F. The financial aid professional receiving the greatest number of votes will be selected as the recipient of The Jack Woodward Award of Excellence.
3. Current members of the Board of Directors are ineligible for nomination.
4. The award may be presented at the Annual Conference. A plaque may be presented to the honoree with the following inscription:\*

*The Jack Woodward Award of Excellence is hereby presented to \_\_\_\_\_  
for excellence in leadership, knowledge, expertise, cooperation, professionalism,  
commitment, service, and involvement in MASFAA.*

*Awarded the \_\_\_\_\_ Day of \_\_\_\_\_ 20XX by the \_\_\_\_\_ Board of  
Directors.*

\*All MASFAA plaque's master designs are on file at Mars & Steele, Inc., PO Box 14125, Jackson MS 39236 Ph: 601.982.2828

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Committee Appointments

CODE NO: 1-11

1. By-laws specify committee and committee chair for the Nominations Committee and the Planning Committee.
2. The President appoints committee chairs unless otherwise specified in the By-Laws or in the Policies and Procedures Manual.
3. The President-Elect has the authority to appoint a person(s) to serve as Conference Chair during that President-Elect's term of Presidential office. This appointed person may serve as an ex-officio member on the current Conference Committee and will chair the Conference Committee the following year when the President-Elect becomes President. In the event the appointed person is unable to fulfill the duties of the Conference Chair, the President-Elect (or if then President) shall appoint a person to this position.
4. The Conference Committee Chair may appoint a person to serve as Local Arrangements Coordinator during the Conference Chair's term of service, in consultation with the President.
5. Members may serve on more than one committee in a given year, per approval of the President. Additional committee assignments are allowed only where mandated by the Policies and Procedures and/or Bylaws, or where assigned by the President.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: MASFAA President's Special Recognition Award

CODE NO: 1-12

The MASFAA President's Special Recognition Award will be presented at the Annual Conference to individuals who have performed or provided exemplary service to MASFAA during the current year.

Guidelines:

- Recipient(s) will remain anonymous until the presentation during the Annual Conference.
- The award may be presented each year, at the discretion of the President.
- Recipient(s) must have assisted MASFAA's President to achieve his/her goals and objectives.
- Recipient(s) may or may not be members of MASFAA.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Conference Hospitality Hours

CODE NO: 1-13

1. MASFAA hospitality hours will be during hours other than stated meeting times.
2. MASFAA will close the conference hospitality suites during times of the conference functions.
3. Exhibitors, sponsors, and vendors will coordinate conference related activities with the Conference Chair, if applicable.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Newsletter

CODE NO: 1-14

1. The MASFAA Messenger is the name of the newsletter.
2. The MASFAA Messenger is published three times a year for MASFAA members.
3. Articles submitted for newsletter publication by any person, company, or organization is subject to final acceptance by the Newsletter Committee before printing of the newsletter. The Newsletter Committee reserves the right to reject or edit for content or length any article or information submitted for the newsletter. Articles must be intended for the benefit of MASFAA members and not for company marketing or promotional purposes.
4. Newsletters will be available online.
  - The first issue should include fall training and registration information, nominees for honorary lifetime membership, and a call for SASFAA nominations.
  - The second issue should include requests for nominations for the Jack Woodward Award of Excellence and officers for the upcoming year.
  - The third issue should include Annual Conference and registration materials, and biographical sketches of nominees for office.
5. Newsletters will be available online to individuals who have paid membership dues during the current and/or prior year and to all living honorary lifetime members. In addition, newsletters may be available online to the SASFAA Board as determined by the MASFAA President.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Scholarship

CODE NO: 1-15

In the event donations are made to fund a scholarship award at the MASFAA Annual Conference, the following guidelines are to be administered:

1. Each school represented at the Annual Conference by a MASFAA member will be eligible to be included in a random drawing for this scholarship.
2. A Scholarship Request Form will be given to the winning institution after the drawing.
3. The institution receiving the scholarship will select the recipient(s) of the award and submit the Scholarship Request Form to the Treasurer. The Scholarship Request Form must be requested prior to the expiration date, along with the identity of the recipient(s) and requested data. Failure to request funds within the time frame may result in a loss of scholarship.

CONFERENCE AWARDED FUNDS  
Annual Conference

DEADLINE TO REQUEST FUNDS  
October 31st

4. The Treasurer will mail the check to the institution, co-payable to each recipient and institution, along with a list identifying the contributors of the scholarship fund.
5. If the institution fails to submit the check request voucher within the designated time-frame, a new drawing will be held at the following conference.

**Mississippi Association of Student Financial Aid Administrators, Inc.**  
**SCHOLARSHIP REQUEST FORM**

**INSTITUTION:** \_\_\_\_\_

**ADDRESS:** \_\_\_\_\_

**DATE PRESENTED:** \_\_\_\_\_ **SCHOLARSHIP** \$

**EXPIRATION DATE:**

Form must be completed and submitted to the Treasurer  
no later than the appropriate date indicated below:  
**PRESENTED** \_\_\_\_\_ **EXPIRES** \_\_\_\_\_  
Annual Conference.....October 31st

<b>PLEASE LIST RECIPIENT(S) OF SCHOLARSHIP FUNDS</b>
STUDENT'S NAME:
HOMETOWN:
AMOUNT AWARDED:
STUDENT'S NAME:
HOMETOWN:
AMOUNT AWARDED:
STUDENT'S NAME:
HOMETOWN:
AMOUNT AWARDED:

I hereby request MASFAA to issue a check(s), co-payable to the above referenced school and student(s).

\_\_\_\_\_  
Director of Financial Aid

\_\_\_\_\_  
Date

**Mail completed form to:**  
  
MASFAA Treasurer

**FOR TREASURER USE ONLY:**  
  
**DATE RECEIVED:** \_\_\_\_\_  
**DATE DISBURSED:** \_\_\_\_\_  
  
**AMOUNT DISBURSED:** \_\_\_\_\_  
**# OF Recipients:** \_\_\_\_\_

**PROCEDURES FOR REQUESTING  
MASFAA SCHOLARSHIP DISBURSEMENT(S)**

1. Each school representative that is a paid MASFAA member will be eligible to submit his/her institution's name for a random drawing.
2. A Scholarship Request Form will be given to the institution after the drawing.
3. The institution receiving the scholarship will select the recipient(s) of the award and submit the Scholarship Request Form to the Member-At-Large. The Scholarship Request Form must be requested prior to the expiration date, along with the identity of the recipient(s) and requested data.

CONFERENCE AWARDED FUNDS	DEADLINE TO REQUEST FUNDS
Annual Conference	October 31st

4. Failure to request funds within the time frame may result in a loss of scholarship.
5. The Member-At-Large will submit an approved check request form to the Treasurer for payment.
6. The Treasurer will mail the check to the institution, co-payable to each recipient and institution, along with a list identifying the contributors of the scholarship fund.
7. If the institution fails to submit the check request voucher within the designated time-frame, a new drawing will be held at the following conference.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Listserv

CODE NO: 1-16

1. The MASFAA listserv is established as a mechanism for information exchange and problem resolution for use by Mississippi colleges and universities financial aid administrators and related personnel. It is intended to provide a statewide forum for the discussion of all matters relating to the ADMINISTRATION of student financial aid at Mississippi institutions of higher education. List delivery is available in "immediate" delivery mode for up-to-the-minute messages only.

Note: There is no official archive for this list.

2. MASFAA listserv subscription is reserved for current MASFAA members and those who are interested in Mississippi financial aid administration. This listserv is not for individual student or parent questions about applying for or receiving financial aid or scholarships. Such questions are better addressed to a specific college. Correspondence is monitored to protect MASFAA's membership and to ensure proper use of the listserv.

3. The following may be posted to the listserv: financial aid-related queries and discussion items, MASFAA organizational announcements, aid-related position vacancies, and items that can be considered "public service" in nature. Messages must be appropriate for this listserv. Off-topic posts will be considered SPAM. Any questions as to the appropriateness of a posting should be directed to the Electronic Services Chair.

4. MASFAA is a non-profit, professional organization; therefore, listserv postings that promote or advertise goods or services are forbidden.

#### 5. Listserv Guidelines

- "Netiquette" must always be observed. (See "Basic Netiquette" below.)
- MASFAA's listserv is not a forum for arguments or off-topic discussions. Anyone who "attacks" another member on the list will be unsubscribed from the listserv.
- Members should not reply to the message sent to the listserv. Modify the email address and subject line to reflect the individual email address and content of the message.
- Flaming, spamming and other inconsiderate behavior will not be tolerated. Inconsiderate participants will be unsubscribed from the listserv.

(continued)

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Listserv (*continued*)

CODE NO: 1-16

- Posting members must provide their name and email address on each message.
- Use of the list for illegal activities is strictly prohibited. Posting of material that may be considered racist, hateful, pornographic, etc., is forbidden.
- Members should not post subscription change requests, etc., to the list.
- Questions regarding the listserv and/or the proper use of the MASFAA listserv should be directed to the Electronic Services Chairman. Issues not resolved at this level will be taken under consideration by the MASFAA Board of Directors.
- By subscribing to the listserv, members are confirming that they have read and agree to the terms of MASFAA's listserv policy statement and guidelines.

6. Basic Netiquette

MASFAA's listserv policy is not the final word on Cyberspace Etiquette. We suggest reading and following the guidelines found at:

<http://www.albion.com/netiquette/corerules.html>

7. MASFAA Members are automatically subscribed to the MASFAA's listserv.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Rookie of the Year

CODE NO: 1-17

1. The Rookie of the Year Award will be voted on by the Board of Directors of the Association prior to the Annual Conference, when so disposed.
2. Nomination will be solicited from members of the Association using the following criteria:
  - A. Must be a practicing student financial aid professional. (Postsecondary Institution, Lending Institution, Guarantee Agency)
  - B. Must be active in profession for two years or less prior to award year.
  - C. Must hold current membership in the MASFAA.
  - D. Must be recommended by a current member of MASFAA.
  - E. Recommendations will be reviewed by the Board of Directors and evaluated on the bases of: involvement in MASFAA, leadership, knowledge, expertise, cooperation, professionalism, commitment, and service.
  - F. The financial aid professional receiving the greatest number of votes will be selected as the recipient of The Rookie of the Year Award.
3. The award may be presented at the Annual Conference. A plaque may be presented to the honoree with the following inscription:

*The Rookie of the Year Award is hereby presented to \_\_\_\_\_  
for excellence in leadership, knowledge, expertise, cooperation, professionalism,  
commitment and service, and involvement in MASFAA.*

*Awarded the \_\_\_\_\_ Day of \_\_\_\_\_ 20XX by the \_\_\_\_\_ Board of  
Directors.*

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Budget Line Items

CODE NO: 2-1

The President has the authority to exceed any budget line item by \$1000.00 without prior approval by the Board of Directors.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Reserve Fund

CODE NO: 2-2

A minimum of \$25,000.00 will be kept in cash or cash equivalent as an asset of the Association.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Authorization for Treasurer to pay bills  
After expiration of fiscal year

CODE NO: 2-3

The Treasurer will have the authority to pay bills after the expiration of the fiscal year based on the existing budget until the Board of Directors approves a new budget.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Dual Signatures of checks

CODE NO: 2-4

The signatures of the Treasurer and the President shall be required on all MASFAA checks which exceed \$5,000.00.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: MEMBERSHIP DUES

CODE NO: 2-5

1. Membership is for an annual period, beginning 07/01/YY through 06/30/YY (of the following year.)
2. Membership dues are billed annually each July.
3. Annual membership dues are non-refundable and non-transferable.
4. A refund will be made if a duplicate payment is paid to MASFAA for the same member during the same fiscal year.
5. Membership is required for all MASFAA events including training.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Conference Registration Fees

CODE NO: 2-6

1. Conference registration fees will be determined through a reasonable cost analysis by the Board of Directors.
2. Conference registration fees will be charged to all conference attendees unless waived by Honorary Lifetime recipient attending conference to receive their award; or by recommendation of the Conference Chair and approved by the President in consultation with the Treasurer.
3. Conference registration fees are transferable but are non-refundable unless deemed necessary by the Board of Directors.
4. Conference attendees must be paid members of MASFAA, unless (a) attendee is an Honorary Lifetime Member or (b) membership waived by the Conference Chair, i.e. guest speaker.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Guest and Honorary Expenses

CODE NO: 2-7

The following expenses relating to the Association's conference(s) will be paid by MASFAA, either directly or reimbursed to the recipient, and charged against the Conference Committee budget.

- Travel and other expenses of speakers and presenters not affiliated with MASFAA as recommended by the Conference Committee Chair and approved by the Board of Directors
- Travel and other expenses not paid by SASFAA for each SASFAA representative invited to attend MASFAA conference as recommended by the President and approved by the Board of Directors
- Mileage and two nights lodging for Honorary Lifetime Member(s) attending the conference for which they are receiving their award.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Travel Expense Guidelines

CODE NO: 2-8

1. Travel performed at MASFAA expense must be for official MASFAA business.
2. Travel reimbursement will be made to MASFAA officers, committee chairs, committee members and other representatives as approved by the President.
3. Travel will be on a reimbursement basis unless a travel advance is authorized by the President.
4. A MASFAA Reimbursement/Expense Claim form must be completed and provided to the Treasurer. The Treasurer will pay legitimate claims on approved budget items.
5. Claims must be submitted within 30 days of travel expenditures except as approved by the President.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Reimbursable Items

CODE NO: 2-9

1. Travel
  - a. Private auto at the prevailing state rate over the usually traveled route, not to exceed the cost of air coach.
  - b. Air travel will be reimbursed for coach travel only. A copy of the plane ticket must accompany the travel claim.
  - c. The cost of taxis and airport limos will be reimbursed at actual cost, including tip, if appropriate. Receipts should accompany travel claims whenever possible.
2. Lodging - The actual cost of lodging, not to exceed the single room rate at the hotel/motel where lodged, will be paid. Receipts from hotel/motel must accompany the travel claim.
3. Meals - Meal expenses will be allowed based on the prevailing state rate while on authorized MASFAA travel. Receipts for meals should accompany the travel claim. Committee chairs may be reimbursed for meal expenses of the full committee, excluding guests or non-committee members, unless these persons take part in committee activities. The committee chair will list all persons participating in the meal on his/her expense voucher, and expenses for this meal may not otherwise be claimed for reimbursement. Receipts should accompany travel claim whenever possible.
4. Rental Auto - Prior approval of the President is required.
5. Other miscellaneous expenses, which include the following, will be reimbursed. Receipts should accompany the reimbursement request whenever available.
  - a. Phone call relating to MASFAA business. (Reason for call must be provided)
  - b. Tips, other than meals or beverages.
  - c. Limos, taxis, parking, etc.

(Continued)

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Reimbursable Items Cont.

CODE NO: 2-9

6. Elected Officers – Reimbursable conference expenses  
(as approved by board upon an annual evaluation of MASFAA budget)
  - a. President:
    1. NASFAA – registration, cost of transportation, meals (not provided at the conference), and lodging at the annual NASFAA Conference
    2. SASFAA – cost of transportation and meals for SASFAA Board meetings; one night lodging prior to the annual SASFAA Board meeting held prior to the annual SASFAA Conference
    3. Miscellaneous – postage, copying and telephone calls related to MASFAA
  - b. President-Elect:
    1. SASFAA – cost of transportation and meals and one night lodging prior to the annual SASFAA Board meeting held prior to the annual SASFAA Conference
    2. NASFAA - registration, cost of transportation, meals and lodging for the individual's first-time attendance at the NASFAA Leadership Conference
  - c. Vice President:

NASFAA - registration, cost of transportation, meals and lodging for the individual's first-time attendance at the NASFAA Leadership Conference
  - d. Treasurer:

NASFAA - registration, cost of transportation, meals and lodging for the individual's first-time attendance at the NASFAA Leadership Conference
  - e. Secretary:

NASFAA - registration, cost of transportation, meals and lodging for the individual's first-time attendance at the NASFAA Leadership Conference
  - f. Member-at-Large:

NASFAA - registration, cost of transportation, meals and lodging for the individual's first-time attendance at the NASFAA Leadership Conference

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Newsletter Advertisement Expense

CODE NO: 2-10

The Board of Directors will review and set annually the cost of newsletter advertisements.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: SASFAA/NASFAA Campaign Expenses

CODE NO: 2-11

1. MASFAA will support any MASFAA member as a candidate nominated for a SASFAA or NASFAA office.
2. The Board of Directors will determine the level of expenditures for any campaign related expenses.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Treasurer's Report

CODE NO: 2-12

1. The Treasurer must submit an annual report of the receipts and expenditures ending June 30 of each year.
2. A current Treasurer's Report must be presented to the membership at the Annual Conference.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Bonding of Officers	CODE NO: 2-13
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The President and the Treasurer of the Association must be bonded at MASFAA's expense.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Nominations Process

CODE NO: 3-1

1. The Immediate Past President will serve as Chair of the MASFAA Nominations Committee, with the four most recent Past Presidents whom are active MASFAA members serving on the committee.
2. The second MASFAA newsletter will carry a solicitation for nominations. Solicitation of nominations will also be posted on the MASFAA listserv.
3. The Nominations Committee Chair will set a date, time, and place for a meeting of the committee.
4. A member of the Nominations Committee will not be nominated as candidate for office.
5. The Nominations Committee must present a dual slate for all offices if possible.
6. The Nominations Committee Chair will contact the nominees to determine if they will seek the office for which they are to be nominated.
7. The Nominations Committee Chair will submit candidates' biographical and other pertinent data to the Newsletter Editor, or otherwise publish and distribute to all MASFAA members at least 30 days prior to election.
8. The Nominations Committee Chair will prepare and present to the Board of Directors a written report of the proposed slate of candidates.
9. Members paid for the fiscal year in which the election takes place will be allowed to vote on the slate of candidates.
10. The Nominations Committee Chair will inform the unsuccessful candidates prior to any general announcement.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Election Procedures

CODE NO: 3-2

1. The election will be held during the Annual Conference. A business session shall be scheduled early in the conference at which time the nominees from the Nominations Committee will be received and nominations allowed from the floor.
2. Each paid member of MASFAA will receive an electronic ballot containing the names of the candidates running for office. Provision will be made for the addition of candidates nominated from the floor.
3. The Nominations Committee Chair will arrange for electronic voting via the MASFAA Web site.
4. The electronic voting will begin ten (10) calendar days prior to the Annual Conference for absentee voting. Electronic voting will remain available until 3 P M CT on the second day of the Annual Conference.
5. The Nominations Committee Chair will report the results at the final general business session of the Annual Conference.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Candidate Nominations from the floor

CODE NO: 3-3

1. Candidates nominated from the floor are provided the same opportunity to present their statement of candidacy as MASFAA slate of candidates.
2. The nominee must be a paid member of MASFAA.
3. The individual making the nomination must be a paid member of MASFAA.
4. Copies of the nominees' resume shall be distributed to the membership as directed by the President.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Absentee Ballots

CODE NO: 3-4

1. The voter must be a paid member of MASFAA for the fiscal year in which the election takes place. The member who voted by absentee ballot and who subsequently attends the conference cannot vote in the general election.
2. The official absentee ballot will be made available on the MASFAA Web site ten (10) calendar days prior to the Annual Conference.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Campaign Guidelines

CODE NO: 3-5

1. Each candidate will be featured in the third issue of the *MASFAA Messenger*. Each candidate will be asked to provide a black and white glossy photograph or a digital photograph and a brief resume.
2. No hospitality suites will be held in support of the candidacy of any individual.
3. No mass solicitation of the MASFAA membership (excluding the *Messenger* feature) will be made by or on behalf of a candidate.
4. Each candidate will be expected to speak on his or her candidacy three to five minutes at the opening business meeting at the Annual Conference, even if running on a single slate (allowing the membership to meet the candidate).

THE INTENT OF THESE GUIDELINES IS TO PROVIDE EQUAL OPPORTUNITY FOR ALL CANDIDATES AND TO REDUCE THE COSTS FOR CAMPAIGNING.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Conference Committee Job Description

CODE NO: 4-1

**Purpose**

The Conference Committee will be responsible for planning and conducting the Annual Conference.

**Conference Committee Responsibilities**

1. Coordinate and oversee activities of Program Committee, Local Arrangement Committee, Vendor/Sponsor Committee and Site Selection Committee.
2. Develop Conference budget
3. Pre-Conference meetings and arrangements (i.e. Board of Directors, Committees)
4. Program Packets
5. Letter/Brochure regarding conference
6. Hotel Information
7. Folder Labels
8. Assign comp rooms
9. Program evaluation - review and report to Board
10. Review and approve conference bills and submit to Treasurer for payment
11. Gifts for Speakers

**Program Committee Responsibilities**

1. Develop General and Interest Sessions
2. Arrange for Presenters, as needed
3. MASFAA Business meeting(s)
4. Opening Session – Identify Keynote Speaker
5. State Programs Update
6. Federal Update
7. Room Assignments, set ups – Coordinate with Local Arrangements
8. Schedule Moderators for sessions
9. Instructions via Email for Moderators  
Forward Biographic Information on Speaker, as available
10. Coordinate Audio/Visual Requirements with Local Arrangements (including data lines)
11. Supply Agenda for MASFAA Messenger
12. Coordinate Printing of Conference Programs
  - Printing schedule
  - Include map of hotel
  - Only one day per page
  - Mini schedule for Nametags

Continued

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Conference Committee Job Description continued CODE NO: 4-1

**Program Checklist**

- \_ Theme
- \_ Decorations
- \_ Coordination with sponsorship development chair
- \_ Program format
- \_ Presenters
- \_ Speakers/special guests
- \_ Audiovisual equipment and microphone
- \_ Menu selections
- \_ Head table placards
- \_ Program portfolios
- \_ Name tags (Membership Chair's duty)
- \_ Pre-program publicity
- \_ Entertainment and/or special speakers
- \_ Evaluation forms

**Local Arrangements Committee Responsibilities**

1. Develop a theme for conference and conference items
2. Provide decorations for hospitality suite and general meeting room(s)
3. Coordinate all meals and breaks/snacks with hotel staff/sponsors
4. Entertainment
  - President's Reception
  - Night on own
5. Assign monitors
  - Instructions via email
  - Packets of evaluations with labels for each session
6. Stock and staff hospitality suite
7. Supply signs for all sponsored events
8. Distribute cameras and provide photographers
9. Arrange gifts for award recipients, honorees, and retirees.
10. Choose a charity and coordinate contributions
11. Arrange transportation for guests as needed

Continued

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Conference Committee Job Description continued CODE NO: 4-1

**Vendor/Sponsor Committee Responsibilities**

1. Letter to vendors/sponsors soliciting conference sponsorship
2. Coordinate with Drayage Company
  - Table set up 6' (8' upon request)
  - Skirting
  - Electricity to display room
  - Shipping of display materials
  - Overall costs to vendors
3. Liaison to the Board of Directors

**Site Selection Committee Purpose**

1. Research and recommend future conference and training sites as instructed by the Board of Directors.
2. Consider location, facilities (sufficient meeting rooms), transportation, and cost of hotel/motel accommodations when choosing a site.
3. Choose sites only in Mississippi.
4. Make recommendations to the membership at the Annual Conference.

**Responsibilities**

1. Obtain at least three bids or proposals showing all of the items on the Hotel Checklist
2. Prepare written comparison for Board of Directors approval

Continued

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Conference Committee Job Description continued CODE NO: 4-1

**Hotel Checklist**

Hotel \_\_\_\_\_ Contact \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Number of meeting rooms the hotel can make available:

Monday \_\_\_\_\_  
Tuesday \_\_\_\_\_  
Wednesday \_\_\_\_\_  
Thursday \_\_\_\_\_  
Friday \_\_\_\_\_

Number of sleeping rooms available:

Monday \_\_\_\_\_  
Tuesday \_\_\_\_\_  
Wednesday \_\_\_\_\_  
Thursday \_\_\_\_\_  
Friday \_\_\_\_\_

Room rates: single, double, and other  
2 rooms at government rate for DOE representatives to reserve  
Complimentary room ratio  
Complimentary suite for President  
Advance deposit requirement with room reservations  
Timing of release of unreserved rooms in the block  
Number of meeting rooms, capacities, layout (obstructions, distractions, etc) and any charge for use  
Availability of audio-visual equipment and any charges  
Charges for storage/shipping/delivery of vendor boxes  
Size, location and lighting of exhibit area  
Easy access for loading and unloading of displays  
Parking: availability, security, charges  
Area to accommodate conference registration  
Workroom for conference staff  
Rooms for pre-conference meetings (Board and committees)

Continued  
MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Conference Committee Job Description continued CODE NO: 4-1

Hotel Appearance: general condition of hotel, guest rooms, meeting rooms, and lobby

How would you rate the following?

Hotel furnishing and décor  
Housekeeping  
Food service

Check-in and front desk handling  
Attitude of personnel

Hotel Services: restaurants, entertainment, and exercise equipment, shops  
Transportation to airports and nearby attractions

Ease of room registration: 800 number, room registration cards, website

Will they provide maps to hotel?

Food Service

Banquet and luncheon menus, varied as to selection and price

Miscellaneous

Any special features about hotel, which make it unique  
Whether there are any other major conventions booked for the same dates  
Whether late checkout is allowed for some of the membership

**Conference Policy and Procedures**

1. Registration will be charged to all participants. Exceptions to this policy will be approved by the President, Conference Chair and Treasurer.
2. Refunds—nonrefundable but transferable. Any exceptions must be approved by the President, Conference Chair, and Treasurer.
3. The Exhibit Area will be closed during all general sessions.
4. Hospitality Hours—any hospitality suites will be asked to close during meeting times of the actual conference.
5. Hospitality Sessions—more than one hospitality session can be scheduled at the same time in order to handle the number of participants at the conference.

Continued

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Conference Committee Job Description continued CODE NO: 4-1

- a. Honoraria to speakers and presenters, upon recommendation of the Conference Chair and approved by the President and Treasurer. (Within Conference Budget)
- b. Other such expenses recommended by the Conference Chair and approved by the President and Treasurer. (Within Conference Budget)

**Conference Activity Checklist:**

**Program Chair:**

- \_ Oversee conference budget/expense
- \_ Develop pre-conference materials
- \_ Web-site registration development
- \_ Meet with Hotel staff
- \_ Coordinate with Local Arrangements
- \_ Develop general and interest sessions
- \_ Develop social activities
- \_ Identify keynote speaker
- \_ Identify presenters and moderators
- \_ Sign coordination for all sessions, breaks, sponsors
- \_ Place card design and set up of head table
- \_ Reserved table for sponsors and guests
- \_ Reserved table for program committee
- \_ Coordinate vendor needs with Sponsorship Chair
- \_ Coordinate printing of conference program
- \_ Coordinate notebook of activities
- \_ Coordination of conference mailers
- \_ Letter/brochure regarding conference
- \_ Tentative agenda
- \_ Conference Registration form (from Membership Chair)
- \_ Hotel Registration form
- \_ New Aid Officer's Registration form
- \_ Coordination of Conference Packets
- \_ Folders
- \_ Folder labels
- \_ Program
- \_ Evaluation
- \_ Treasurer's Report

Continued  
MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Conference Committee Job Description continued CODE NO: 4-1

- \_ Minutes of last Business Meeting
- \_ Local Attraction Information
- \_ Vendor/Sponsor flyers

**Local Arrangements:**

- \_ Communicate with hotel staff
- \_ Coordinate AV rentals
- \_ Room assignments/setups
- \_ Easels for signs
- \_ Banner Location
- \_ Coordinate breaks
- \_ Determine menu and meal count
- \_ Coordinate decorations, flowers, etc.
- \_ Coordinate entertainment setup
- \_ Copier availability
- \_ Assign comp rooms

**President:**

- \_ Selection of invocation presenter
- \_ Communication to those sitting at head table
- \_ Banner
- \_ Welcome
- \_ Letter for Program

**Sponsorship Chair:**

- \_ Communicate with all past vendors/sponsors
- \_ Notify program chair and treasurer of sponsored breaks and meals
- \_ Notify Local Arrangements of # tables needed, electrical, etc.
- \_ Notify sign coordinator of sponsored by signed needed
- \_ Coordinate information to vendors regarding Shipping and Receiving of materials

**Membership/Treasurer - Registration:**

- \_ Conference registration form to Program Chair
- \_ Nametags
- \_ Recruit/assign workers

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Vendor-Sponsor Job Description

CODE NO: 4-2

### **Purpose**

The Chairperson must work closely with the Board and Committee Chairs to determine annual sponsorship opportunities.

### **Responsibilities – General**

1. Prepare reports containing vendor/sponsor information to be presented at each MASFAA Board Meeting.
2. Update the vendor/sponsor mailing list by checking the information received from each organization against the mailing list and update appropriately.
3. The Chairperson works closely with the Conference Chair on the cost of events for the conference. This needs to be accomplished in a timely manner (no later than two months prior to the conference date). The Vendor-Sponsor Chair should arrange for signage or appropriate recognition of supporters of each event.
4. At the discretion of the Vendor-Sponsor Chair, other ways of recognizing vendors, (i.e. signs on vendor tables), recognition at specific events, etc. may be done in lieu of signs.
5. Information on conference support will be furnished to the Board and the Conference Chair on a timely basis. This would include the events/activities, the amount of the support, and the number of conference registrations that should be considered complimentary. (The use of complimentary registrations will be determined by vote of the Executive Board.)
6. The Vendor-Sponsor Chair will serve as Liaison to the Board of Directors for the vendors and sponsors.

### **Responsibilities – Conference**

1. Determine the location of the exhibit space in coordination with the Conference Chair and hotel/convention center staff
2. Coordinate with the drayage company for the following –
  - A. Table set up 6' (8' upon request)
  - B. Skirting
  - C. Seating
  - D. Trash Disposal

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

**Responsibilities – Conference**

3. Determine the location of the exhibit space in coordination with the Conference Chair and hotel/convention center staff
4. Coordinate with the drayage company for the following –
  - E. Table set up 6' (8' upon request)
  - F. Skirting
  - G. Seating
  - H. Trash Disposal

SUBJECT: Vendor-Sponsor Job Description (*continued*)

CODE NO: 4-2

- I. Electricity to exhibit hall
- J. Shipping of display materials
- K. Overall costs to vendors
5. Approximately eight weeks prior to the conference send information to the mailing list which includes the following details:
  - A. Date, time and location of conference
  - B. Location of exhibit space at hotel/convention center with material shipping details
  - C. Logistics of the exhibit space (how large, what type of exhibits), dates and times for exhibit set up and break down and when the exhibit hall will be open and closed during the conference.
  - D. Levels of support and amount of contribution needed to reach each level.
  - E. Support amounts are communicated to the Treasurer and invoices are sent to each contributing organization. These invoices should be paid prior to the conference.
  - F. Solicitation of items (type and number) to be included in conference tote bags – if the Conference Committee decides to provide these bags to attendees.
6. Once supporters begin to respond to the Vendor/Sponsor Chair, a list should be compiled periodically and sent to the Conference Chair indicating the following:
  - A. Organizations that have responded , organizations' contact person, and the amount of the contribution

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Vendor-Sponsor Job Description (*continued*)

CODE NO: 4-2

7. A list should be compiled periodically and sent to the Treasurer with the following information:
  - A. Name and address of organization
  - B. Amount of contribution
  - C. Treasurer will then bill the organization prior to the start of the conference. If checks for contributions are received by the Vendor/Sponsor, these will immediately be forwarded to the Treasurer.
8. Prior to the conference, a layout of the exhibit hall should be secured from the hotel/convention center coordinator indicating the exhibit area and space available. At that time, exhibitors should be assigned according to the amount of their contribution. Signs should be made to be placed on each space or table indicating the name of the organization to which that space has been assigned. These signs need to be placed in each exhibit space prior to the time that exhibitors arrive to set up.
9. Any organization that is contributing items to be placed in the conference tote bags should receive information on shipping as follows:
  - A. Items may be shipped either directly to the hotel or delivered by the contributor; however, in order for them to be included in the tote bags, they need to arrive no later than noon of the day prior to the conference.
  - B. Shipping information for the hotel/convention center coordinator or drayage company (They will provide how the shipping labels on these items should be addressed.)
  - C. Each contributor should indicate that the contents of the container is tote bag items by attaching a label which predominately says: "TOTE BAG ITEMS"
10. At the conference site, the Vendor/Sponsor Chair should meet with the hotel/convention center coordinator to determine where the containers with tote bag items have been stored. These containers should be moved to the meeting room where the tote bags are to be assembled.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Electronic Services Committee Job Description CODE NO: 4-3

**Purpose**

Coordinate and maintain the MASFAA web page, recommend activities to improve our electronic communications and use of electronic technology, and work with the conference, training, and program chairs in coordinating training sessions and demonstration workshops for the members.

**Responsibilities**

1. MASFAA web page

Frequent updates - information must be kept up-to-date in order for members to feel comfortable relying on it.

Work with Member-at-Large to update membership listings. At a minimum, should be updated three times a year.

Work with Legislative Chair to include timely information on legislative actions and issues.

Work with Conference Chair to set up conference registrations on line.

2. Other Electronic Communications

Continuously assess the association's communications for possible improvements, changes, deletions, problems, etc.

Monitor usage of MASFAA listserv, and electronic announcements, etc.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: High School Relations Committee Job Description    CODE NO: 4-4

**Responsibilities:**

1. The High School Relations Committee will support the vision of the MASFAA by continuing to “serve the interests and needs of students, postsecondary educational institutions and their aid administrators, and public and private agencies and organizations concerned with student financial aid”. Our commitment is to see every child in the State of Mississippi achieve his or her educational goals—regardless of ethnicity, income, or background.
2. The Chair and members of the High School Relations Committee are to serve as the liaisons between the financial aid community, particularly with regard to MASFAA and Mississippi’s high school students and their families.
3. The High School Relations Committee will be available to serve Mississippi’s High School Counselors by forwarding to them, upon request, current application and educational materials regarding financial assistance options for their students.
4. The High School Relations Committee will initiate and promote the implementation of special financial aid events at schools and in communities at large to assist Mississippi’s high school students and their families in becoming more aware of financial aid opportunities.
5. The High School Relations Committee will promote and maintain relationships with Lenders, Servicers, and other financial institutions for the purpose of working with these other professionals to provide educational opportunities for students in the State of Mississippi.
6. The High School Relations Committee will develop and maintain a database of the names, address, and telephone numbers of contact information relevant to Mississippi’s High Schools, i.e. Superintendents, High School Counselors, and High School Principals.
7. The High School Relations Committee will continue to develop partnerships with High School Counselors and other school administrators with regard to educating students and their families of preparatory measures that will ensure retention at post-secondary institutions and ultimately lead to the successful completion of a degree.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Legislative Committee Job Description

CODE NO: 4-5

**Purpose:**

The Legislative Committee will be responsible for dissemination of both Federal and State legislative issues as they arise in order to keep the membership of MASFAA informed, and prepare appropriate responses for the MASFAA President/Board as requested.

**Responsibilities:**

**Federal:**

1. Review USDE Notices of Proposed Rulemaking, Final Regulations and Dear Colleague Letters for impact on Title IV programs, and to make recommendations to the Board for responses.
2. Review changes to the law made by Congress for impact on Title IV programs.
3. Review other USDE materials when changes are implemented (i.e., Student Financial Aid Handbook or Verification Guide.)

**State:**

1. Review legislative and regulatory changes for state financial aid programs, and make recommendations to the Board for responses.
2. Cultivate state sources for information and maintain open communications.

**General:**

1. Dissemination of information
2. Utilize the *Messenger*
3. Communicate emergency information to the President for communication via e-mail or phone.
4. Assist in the preparation of letters to officials as approved by the MASFAA Board.
5. May be asked to serve as MASFAA Representative to the SASFAA Legislative Committee.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Member-at-Large Job Description

CODE NO: 4-6

**Responsibilities:**

1. Maintain membership data.
2. Notify members via the listserv when membership fees are due and give necessary information for remittance. Remind members to update any changes to membership directory information.
3. Post membership payments to "Payments" section of the web page.
4. Attempt to increase membership.
5. Chair the Membership Committee.
6. Coordinate mentor program for new members who attend the MASFAA Annual Conference. May ask for volunteers to mentor new members or committee can assign mentors and request that they serve in this capacity.
7. Send flowers and cards according to the Policies & Procedures section pertaining to "Flowers and Cards".
8. Provide membership report for newsletters.
9. Coordinate payments with Treasurer periodically to ensure that all payments have been posted to the membership database.
10. Assist with registration at all MASFAA events, including printing of name badges and putting registration packets together.
11. Attend MASFAA Board Meetings and provide reports.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Member-at-Large Job Description (continued)

CODE NO: 4-6

### **MASFAA Mentoring Program Agreement**

**MENTORS** have the opportunity to share their knowledge, experience and insight, give back to the association, and build trust through increased communication.

Responsibilities of the mentor are to:

- Demonstrate a commitment to the mentoring process.
- Develop a mentoring agreement with the mentee clarifying the expectations of the mentoring partnership.
- Show willingness to meet/connect with mentee on a regular agreed upon basis.
- Keep their Director or immediate supervisor informed to ensure that the program does not conflict with work assignments and priorities.
- Aid mentee in establishing networks of contacts within the association and industry-at-large.
- Participate in meetings to support mentee and the mentoring program.
- Give feedback on the mentoring program to the Membership Chair.
- Evaluation to be provided to the Membership Chair at the end of the year.

**MENTEES** who participate in the program will receive an opportunity to form a partnership with someone who can provide feedback on strengths and support/guidance on career choices or aspirations. Mentees can also gain a better understanding of the association in which they participate through the mentoring relationship.

Responsibilities of the Mentee are to:

- Take initiative and be proactive in his/her development.
- Develop a mentoring agreement with the mentor clarifying the expectations of the mentoring partnership.
- Show willingness to meet/connect with mentor on a regular agreed upon basis.
- Keep their Director or immediate supervisor informed to ensure that the program does not conflict with work assignments and priorities.
- Participate in open and honest discussions with mentor.
- Give feedback on the mentoring program to the Membership Chair.
- Evaluation to be provided to the Membership Chair at the end of the year.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Member-at-Large Job Description (continued)

CODE NO: 4-6

**MASFAA Mentoring Program Agreement  
(Optional)**

The Mentor and Mentee should individually complete the following before first meeting. At the first meeting, they should jointly review and discuss each person's answers and reach agreement. The mentor will complete a final agreement. This agreement should be reviewed periodically during the mentoring relationship and be revised as appropriate.

What is the Mentee's goal in the program?	
What type of assistance does the partner want from the Mentor?	
What expectations does the Mentor have of the Mentee?	
What expectations does the Mentee have of the Mentor?	
How often will you meet?	
When and where will you meet?	
For how long?	
Who will be responsible for scheduling our meetings?	
What will be the ground rules for discussions?	
What are the preferred ways to communicate between formal meetings?	
Any additional areas/issues needing to discuss and agree to?	

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Member-at-Large Job Description (continued)

CODE NO: 4-6

## **MASFAA Mentoring Program**

### **Mission statement**

The Mentoring Program is established to promote the Mississippi Association of Student Financial Aid Administrators (MASFAA) mission and vision to individuals as they join the association. There are three aspects to this mission:

1. to use the mentoring program to communicate sound financial aid principles
2. to assist in addressing general questions regarding MASFAA and the accomplishment of its mission
3. to help coordinate member development and awareness among MASFAA members

### **Relationship between Mentors and Mentees**

The mentoring program is meant to supplement the efforts of MASFAA. Mentors will coordinate and communicate progress to the MASFAA Membership Chair. Mentors and Mentees will consult the Chair when issues or questions arise.

### **Discretion**

Although information communicated and shared between a mentor and a mentee is to be treated with discretion, information which is inappropriate or in violation of MASFAA policies should be reported to the Membership Chair.

### **Meetings**

Mentor/Mentee meetings will be held as deemed necessary to discuss best practices, accomplishments, industry news, and Association participation to document the progress of the Program in general.

### **Participation**

The MASFAA Mentor Program consists of the Membership Chair, Membership Committee and Association members (3 years minimum) serving as mentors for new association participants. Participation as a mentor is voluntary and requires approval of the Membership Committee.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Member-at-Large Job Description (continued)

CODE NO: 4-6

**Amendments**

The MASFAA Mentoring Program is expected to evolve with experience, and it may be revised as its role and expertise is documented and refined. The Membership Chair must propose changes and acquire board approval to effectively amend the program.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Newsletter Committee Job Description

CODE NO: 4-7

**Purpose:**

Edit and publish MASFAA association newsletter, *MASFAA Messenger*, in accordance to the Policies & Procedures section on “Newsletter”. The President Elect shall serve as Chair of this committee and Editor of the *MASFAA Messenger*.

**Responsibilities:**

1. Act as Editorial Board to comply with official publication policy as follows: The “MASFAA Messenger” is published three times a year for MASFAA members. Articles submitted by any person, company, or organization to the editor of the newsletter are subject to final acceptance by the Newsletter Committee before printing of the newsletter. The Newsletter Committee reserves the right to reject or edit for content or length any article or information submitted for the newsletter. Articles must be intended for the benefit of MASFAA members and not for company marketing or promotional purposes.
2. Solicit and edit news and other submissions of interest and relevance to the membership. Content should include officer reports, committee reports, current training opportunities, promotion of current events, including conferences, educational information, and news about association members.
3. Submit all newsletter content to President-Elect for formatting and layout work completed newsletter to website vendor for posting to website approximately two weeks in advance of the newsletter going live on the MASFAA website.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Nominations Committee Job Description

CODE NO: 4-8

### **Purpose**

Solicit nominations for the offices of MASFAA, and coordinate slate and election activities. The Past-President serves as Chair.

### **Responsibilities**

1. Establish the committee membership, consisting of the four past-presidents if still paid members.
2. Solicit nominations from the membership by issuing a nominations form in the second issue of the *Messenger* and via the listserv.
3. Present slate to Board
4. Notify all nominees of results, with accepted procedure of notifying defeated candidate first if possible.
5. Request permission to electronically destroy the ballots.

### **Guidelines**

1. The committee will consider the nominees at their first meeting after submission of the nominations forms. All the nominees submitted should have already been contacted by the person nominating him/her and with the agreement to run if the nomination should be submitted. The chairperson will verify that nominees agree to run prior to the first committee meeting. **ALL NOMINEES MUST BE CURRENT MEMBERS OF MASFAA.**
2. The nominees will be considered for placement in the future offices of the MASFAA Board in the following order: President-Elect , Vice President, Treasurer (every two years), Secretary (every two years), Member-at-Large, Directors (one per year)
3. If only one candidate is presented for a position, the committee may nominate a second candidate for the position, provided the nominee is contacted and agrees to run for the position for which the recommendation is submitted.

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MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Nominations Committee Job Description (*continued*) CODE NO: 4-8

4. If two candidates are presented for a position, both candidates must be placed on the ballot for a vote of the total membership.
5. All members of the committee must be present to select the final placement of the nominations to be presented to the membership.
6. An alternate may be submitted to the Board for approval to replace a candidate who requested to be removed from the ballot before the election.
7. Immediately following the Nomination Committee's meeting for the selection process, the President will be notified of the slate of candidates.
8. The chairperson will then present their names to the Board for approval. The MASFAA Newsletter will present these nominees in the third issue, with names of the nominees for each office, pictures and a short biography.
9. The chair will verify the actual electronic results. Committee members will be assigned to notify all nominees of the outcome. The membership will be officially notified of the elected officers at the next business meeting, typically on the last day of the Annual Conference.
10. All discussions and balloting of this committee are confidential. Actual ballot count for each candidate should also be confidential.
11. The electronic ballots will be destroyed upon approval at the next business meeting.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Training Committee Job Description

CODE NO: 4-9

**Purpose**

Plan, develop, and coordinate training opportunities for MASFAA members, (including conferences), and maintain a schedule of training opportunities for state, regional, and national levels.

**Responsibilities**

1. Be responsible for all training programs of the Association, including workshops for new aid officers, advanced level seminars, and any other training sessions required by the Association;
  - a. Survey the needs of the membership
  - b. Plan and direct New Aid Officer's Workshop, Financial Aid 101, including:
    - Sponsorship Development
    - Site Selection
    - Faculty selection
    - Curriculum update
    - Set AgendaAnnouncements and registration forms (to members and institutional presidents)  
Materials: Regulations and handbooks, Participants' notebooks
  - c. Coordination of all statewide training sessions for aid administrators
  - d. Conduct advanced level training
    - Current Issues of concern
    - Management training
  - e. Coordinate MASFAA training with that of SASFAA and NASFAA
    - Announcements of training sessions
    - Distribution of registration forms
    - Selections
    - Activities
2. Coordinate training efforts of the Association with those of the Regional Association and the National Association;
3. Serve on such other committees as appointed;
4. Attend MASFAA Board Meetings and provide reports.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: President Job Description

CODE NO: 4-10

### **Responsibilities**

1. Be the chief executive officer of the Association
2. Preside at all meetings of the Association
3. Serve as chairman of the Board of Directors
4. Appoint all chairpersons and members of the committees
5. Serve as the MASFAA representative to the SASFAA Executive Board
6. Serve, ex-officio, on all committees except the Nominations Committee
7. Authorize all expenditures of the Association
8. Submit an Annual Report to the Association
9. Serve as official spokesperson for MASFAA
10. Attend MASFAA Board Meetings and provide reports.

### **Suggested Guidelines and Procedures**

1. Conference Meetings
  - Prepare business session agenda.
  - Provide members with the business session agenda.
  - Arrange for and notify head table participants
  - Coordinate use of complimentary hotel rooms with conference chairperson.
  - Assign to:
    - President
    - Speakers/Guests
    - Conference Chair
    - Local Arrangements Coordinator
  - Designate individual to present invocation/blessing
  - Introduce special guests during sessions
  - Publicly thank sponsors/vendors
  - Present goals for the year in the first newsletter
  - Present annual report at the MASFAA Transitional Board Meeting
  - Thank officers and committees
  - Pass the gavel

Continued

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: President Job Description (*continued*)

CODE NO: 4-10

2. Board of Directors Meetings
  - Establish calendar
  - Written notification and reminders
  - Reports due
  - Actions required
  - Prepare agendas
  - Outline and present goals
  - Use proper parliamentary procedure
3. SASFAA Participation
  - Prepare and present state report
  - Read all NASFAA and SASFAA material
  - Represent state, not institution, including attendance at SASFAA Annual Conference
  - Provide MASFAA report at SASFAA Board meetings
  - Submit article on behalf of MASFAA for each SASFAA newsletter
4. Expenditures (paid by MASFAA)
  - a. NASFAA – registration, cost of transportation, meals (not provided at the conference), and lodging at the annual NASFAA Conference
  - b. SASFAA – cost of transportation and meals for SASFAA Board meetings; one night lodging prior to the annual SASFAA Board meeting held prior to the annual SASFAA Conference
  - c. Miscellaneous – postage, copying and telephone calls related to MASFAA
5. Communications/correspondence
  - a. Officers
    - Communicate often
    - Phone whenever possible
  - b. Executive Board
    - Keep them informed
    - Acknowledge performance
  - c. Membership
    - Newsletter articles
    - Bulletins

Continued

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: President Job Description (*continued*)

CODE NO: 4-10

Other associations

Keep in touch

Respond promptly

Federal/state officials

Respond to NPRM

Represent association, not self

Stay informed

6. Finance

Authorizing expenditures

Letter to bonding agent regarding new Treasurer

Communicate often with Treasurer

Check ledgers and checkbook

Verification

Consult with the Treasurer on preparation and maintenance of  
the Association budget

Annual audit--June

Continued

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: President Job Description (*continued*)      CODE NO: 4-10

**Activity Calendar for President:**

July	-Attend NASFAA as President of MASFAA. -Schedule and facilitate MASFAA Transitional Board Meeting
July/August	-Attend SASFAA Board Meeting as President of MASFAA (sometimes held in conjunction with NASFAA). -Prepare written report to be distributed at SASFAA Board Meeting. The written report may be used in the SASFAA Newsletter.
September	-Prepare for Fall Board Meeting and contact Board regarding agenda items. -Prepare MASFAA Messenger article. -Prepare SASFAA newsletter article, "Mississippi Report."
October/ November	-Chair MASFAA Fall Board Meeting. -Attend MASFAA Fall Training. -Attend Conference Committee Meeting. -Attend SASFAA Executive Board Meeting. Prepare written report to be distributed at the meeting. The report may be used in the SASFAA Newsletter.
December	-Catch up and touch base with Committee Chairs and Board members in preparation for Winter Board Meeting. -Prepare President's Report for MASFAA Winter Newsletter. -Encourage completion of slate of nominations for officer elections.
January	-Chair MASFAA Winter Board Meeting. -Financial Aid Awareness Month
February	-Attend SASFAA Executive Board Meeting. Prepare written report to be distributed at the meeting. The report may be used in SASFAA Newsletter. -Attend SASFAA Annual Conference. -Chair State meeting at SASFAA Annual Conference.
March	-Prepare for Spring Board of Directors meeting. Contact Officers and Chairs.
April	-Chair Spring Board Meeting -Attend Financial Aid 101 training -Prepare written report, submit to the SASFAA Newsletter.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: President Job Description (*continued*)      CODE NO: 4-10

**Activity Calendar for President Continued:**

May/June	<ul style="list-style-type: none"><li>-Attend MASFAA Annual Conference.</li><li>-Prepare for Summer Board of Directors meeting.</li><li>-Contact Officers and Chairs.</li><li>-Chair MASFAA Summer Board of Directors meeting.</li><li>-Chair MASFAA Conference Business Meeting.</li><li>-Send thank you letters to Board, Committee Chairs (and perhaps to Presidents of institutions), and committee members for work over the past year.</li><li>-Send thank you notes to contributors, vendors, sponsors, patrons, conference committee, and key presenters.</li></ul>
June	<ul style="list-style-type: none"><li>-Attend SASFAA Transitional Board Meeting as MASFAA President. Prepare written report, which may be used in SASFAA Newsletter.</li></ul>

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: President-Elect Job Description

CODE NO: 4-11

**Method of Selection**—Elected by the membership.

**Responsibilities**

1. Perform all duties designated by the President;
2. Perform such other duties and functions as may be required by the Association;
3. Serve as MASFAA Newsletter Editor;
4. The President-Elect has the authority to appoint a person(s) to serve as Conference Chair during the President-Elect's term of Presidential office. In the event this appointed person is unable to fulfill the duties of the Conference Chair position, the President-Elect (or if then President) shall appoint a person(s) to this position.
5. Serve as an understudy to the President
6. Observe the President at all MASFAA committee meetings
7. Plan goals
8. Select committee chairs for the following year
9. Plan proposed budget for upcoming year in conjunction with the budget committee
10. Attend MASFAA Board Meetings and provide reports.

**Suggested Guidelines and Procedures**

1. At all meetings
  - Sit next to the President
  - Know agenda
  - Prepare for possible problems
2. Transition meeting
  - Coordinate date and location
  - Plan agenda for meeting with President's input
3. Serve on Conference Committee for Annual Conference

Continued

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: President-Elect Job Description

CODE NO: 4-11

**Activity Calendar for President-Elect**

July	-Attend MASFAA Transitional Board Meeting as incoming President-Elect
October	-Prepare article for MASFAA Messenger -Attend Executive Board Meeting
November	-Attend MASFAA Fall Training
Dec/Jan	-Attend Winter Executive Board Meeting
February	-Attend President-Elect Training held in conjunction with SASFAA meeting -Attend SASFAA Conference
March	-Attend NASFAA Leadership Training in Washington, D.C. -Prepare article for spring newsletter
April	-Attend Spring MASFAA Executive Board Meeting
May	-Schedule travel plans for NASFAA Annual Conference
May/June	-Attend MASFAA Spring/Summer Conference
June	-Prepare your calendar for the coming year to the extent you can and discuss activities and tentative calendar with your boss and staff. -Attend SASFAA Transitional Board Meeting
July	-Conduct MASFAA Transitional Board Meeting

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Vice President Job Description	CODE NO: 4-12
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**Method of Selection**—Elected by the membership

**Responsibilities**

1. Be responsible for all training programs of the Association, including workshops for new aid officers, advanced level seminars, and any other training sessions required by the Association;
2. Coordinate training efforts of the Association with those of the Regional Association and the National Association;
3. Serve on such other committees as appointed;
4. Perform all duties of the President in the absence of that officer;
5. Succeed to the office of the President in the event of a vacancy in that office.
6. Attend MASFAA Board Meetings and provide reports.

**Activity Calendar for Vice President**

July	<ul style="list-style-type: none"> <li>- Attend MASFAA Transitional Board Meeting</li> <li>- Contact NASFAA re: Training</li> <li>- Set Goals</li> </ul>
August	<ul style="list-style-type: none"> <li>- Select Committee Members</li> <li>- Confirm NASFAA Training Event</li> </ul>
September	<ul style="list-style-type: none"> <li>- Prepare MASFAA Newsletter Article</li> <li>- Schedule Training Committee Meeting</li> </ul>
October	<ul style="list-style-type: none"> <li>- Chair Training Committee Meeting</li> <li>- Submit announcement/registration information for ATAC</li> </ul>
November	<ul style="list-style-type: none"> <li>- Conduct Fall Training</li> <li>- Prepare report for Executive Board</li> <li>- Request Fall Training Evaluations</li> </ul>
December	<ul style="list-style-type: none"> <li>- Prepare MASFAA Newsletter Article</li> </ul>
February	<ul style="list-style-type: none"> <li>- Chair Training Committee Meeting</li> <li>- Finalize workshop agenda/assignments</li> <li>- Submit announcement/registration information for ATAC</li> </ul>
April	<ul style="list-style-type: none"> <li>- Conduct new aid officer training</li> <li>- Prepare report for Executive Board</li> </ul>
May	<ul style="list-style-type: none"> <li>- Prepare report for Executive Board</li> </ul>

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Past President Job Description

CODE NO: 4-13

### Responsibilities

1. Serve as Chairperson of the MASFAA Nominating Committee;
2. Serve as the MASFAA representative to the SASFAA Nomination Committee;
3. Serve as Chairperson of the Planning Committee;
4. Serve as Parliamentarian for Board Meetings and associated meetings.
5. Attend MASFAA Board Meetings and provide reports.

### Suggested Practices

1. SASFAA Nominations
  - Solicit nominations through the MASFAA *Messenger* and listserv
  - Provide announcements at MASFAA meetings or training events
  - Discuss with the Executive Board
  - Attend all committee meetings
  - Work at the polls
2. MASFAA Nominations
  - Solicit nominations through the MASFAA *Messenger* and listserv
  - Provide announcements at MASFAA meetings or training events
  - Collaborate with the committee members to set the slate
  - Arrange for absentee voting to open prior to the conference as specified in the Policies & Procedures section on "Election Procedures"
  - Schedule voting booth duty
  - Confirm final vote count
  - Contact all candidates regarding the election results prior to the general announcement of the new officers

### Activity Calendar for Past President

October	-Solicit nominations for SASFAA officer election in MASFAA <i>Messenger</i>
February	-Solicit nominations for MASFAA officer elections in MASFAA <i>Messenger</i>
March	-Schedule a Nominations Committee Meeting
April	-Present slate to Board of Directors for approval -Schedule a Planning Committee meeting
April/May	-Present slate of candidates and bios in MASFAA <i>Messenger</i>
May/June	-Election at the Annual Conference

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Secretary Job Description

CODE NO: 4-14

**Method of Selection**—Elected by the membership for a period of two years, the voting year alternates with Treasurer.

**Responsibilities**

1. Record and maintain minutes of the Board of Directors and of the Association.
2. Produce copy of meeting minutes to current Board of Directors and Committee Chairs within 30 days of held meetings.
3. Post meeting minutes to the MASFAA website.
4. Keep and update the permanent file of all official documents of the Association, work in collaboration with the Archives Committee to maintain these records.
5. Upon the completion of a term of office, turn over to the new Secretary, within 30 days after the close of the fiscal year, all the Association's secretarial records;
6. Be responsible for maintaining the Constitution and Bylaws of the Association.
7. Attend MASFAA Board Meetings and provide reports.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Treasurer Job Description

CODE NO: 4-15

**Method of Selection**—Elected by the membership for a period of two years, voting year alternates with Secretary and Member-at-Large.

### **Responsibilities**

1. Receive all Association monies and keep the books of the Association;
2. Pay the bills of the Association within 30 days of authorization by the President;
3. Arrange for the billing and collection of dues of the Association upon direction of the Board of Directors;
4. Be responsible for conducting all on site registrations with the assistance of the Member-at-Large;
5. Arrange for collection of the registrations for meetings of the Association;
6. Prepare and maintain an annual budget for the Association, in consultation with the President, by soliciting input of the elected officers and committee chairs and, as needed, the Past Treasurer
7. Upon the completion of the term of office, turn over to the new Treasurer, within 60 days after the close of the fiscal year, all financial records of the Association;
8. Be bonded at the expense of the Association;
9. File the 1099 form annually in accordance with IRS regulations.
10. Attend MASFAA Board Meetings and provide reports.

### **Suggested Guidelines and Procedures**

1. Fund Control/Ledgers
  - Monthly receivables account
    - Membership
    - Conference fees
    - Sponsorship
    - Interest earned
    - Miscellaneous income
  - Monthly expenditures account
    - Travel
    - Supplies
    - Postage
    - Budget--line item accounts
    - Other

Continued

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Treasurer Job Description (*continued*) CODE NO: 4-15

Monthly Expenditures Continued:

Monthly report of receipts and expenditures to President, President-Elect, Budget Chair

Report to board and membership each meeting

Open books to President and Audit and Finance Committee as requested

Submit expenditure request to President for approval

Select a bank that will guarantee a favorable interest rate

Invest reserve fund with the approval of the Board of Directors

Attend Treasurer training one-day prior to NASFAA Annual Conference.

2. Good practice

Keep books current

Write receipts promptly

Require receipts as mandates

Balance ledger accounts to bank balance monthly

Checks payable to individuals, companies or institutions (none to *CASH*).

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Audit/Finance Committee Job Description

CODE NO: 4-16

**Purpose:**

Develops, oversees and maintains proper fiscal controls and financial management strategies to ensure the fiscal integrity of the Association.

**Responsibilities:**

1. Assist the Treasurer with preparation of the fiscal budget
2. Monitor expenditures, analyze cash flow trends, and advise the Board regarding short-term and long-term investments
3. Conduct with the Treasurer quarterly reviews of cash balances and expenses and make appropriate recommendations
4. Perform a checkbook audit at the annual conference and make a report at the transitional Board meeting
5. Recommend budget adjustments, as appropriate, to stay within budget guidelines
6. Maintain a copy of the Association's financial software as well as monthly backup files of the Association's financial data from the Treasurer
7. Review, from a fiscal liability perspective, all contract proposals and make recommendations to the President
8. Work with the Treasurer to ensure that all financial reports including tax returns are filed by established deadlines

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Archives Committee Job Description

CODE NO: 4-17

**Purpose:**

Collect and store archives of the Mississippi Association of Financial Aid Administrators and have the documents scanned to electronic media on a regular basis. A copy of the electronic records is stored in the MASFAA filing cabinet located in the Financial Aid Office of Millsaps College, Jackson, MS.

**Responsibilities:**

1. Throughout the year, accumulate minutes, and reports from all Executive Board meetings and business meetings of the association.
2. Hold copies of all newsletters and other published documents of the association.
3. Catalog and organize documents and submit to the vendor chosen by the Executive Board to scan and store documents for the association.
4. Photographs and other mementos of MASFAA functions do not need to be scanned and stored electronically but are stored by the Archives Chairperson and must be passed to the successor upon the completion of their term as chairperson.
5. The following form is a guideline of the items that need to be collected and scanned each year.

**MASFAA HISTORICAL RECORDS**

\_\_\_\_\_ **YEAR**

**NEWSLETTERS**

\_\_\_\_\_ **FALL**  
\_\_\_\_\_ **WINTER**  
\_\_\_\_\_ **SPRING**

**CONFERENCE PROGRAMS**

\_\_\_\_\_ **FALL (TRAINING)**  
\_\_\_\_\_ **SPRING**

**MINUTES:**

**EXECUTIVE BOARD MEETINGS:**

**BUSINESS SESSIONS:**

**ANNUAL REPORT**

\_\_\_\_\_

**TREASURER'S REPORT**

\_\_\_\_\_

**MISC DOCUMENTS:**

\_\_\_\_\_ **TAX RETURN**

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Directors Job Description

CODE NO: 4-18

**Responsibilities:**

1. Attend all Board Meetings as called by the President and serve in a voting capacity
2. Provide counsel to the Board on matters of planning and governance
3. Meet at least annually to conduct a review of the MASFAA Constitution, Bylaws, and Policies & Procedures and make recommendations to the Board for changes as needed
4. Serve on the Planning Committee, chaired by the Immediate Past President, to develop a long-range plan for the association
5. Attend MASFAA Board Meetings and provide reports.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Diversity Committee Job Description

CODE NO: 4-19

1. The Diversity Committee Chairperson should work with the Board of Directors to ensure that MASFAA membership diversity issues are represented in all aspects of the organization.
2. New ideas to diversify the membership can be examined by the committee each year and presented to the Board for discussion.
3. The Chair of the committee should seek new ways and ideas to express and spotlight diversity issues to the committee as well as the membership.
4. The committee should review the purpose of the Diversity Committee annually. This will enable the diversity aspects of this organization to grow each year.
5. The Chair along with the committee members should update the diversity web page each year. This page is intended to be a universal link for the membership to review during the year to assist them with diversity issues as it relates to their workplace. This resource web page will provide tips for the membership as they are working with student issues related to diversity.
6. The Chair may be asked to serve on the SASFAA diversity committee.

MISSISSIPPI ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.  
POLICIES AND PROCEDURES

SUBJECT: Planning Committee Job Description

CODE NO: 4-20

**Purpose:**

The Planning Committee is responsible for establishing a Long-Range plan to be continuously built upon. The Planning Committee will systematically explore and work toward future opportunities, while analyzing and avoiding threats to the organization. The Planning Committee will make recommendations to the Board on issues as requested by the members, as well as issues of immediate or long range concerns. The Planning Committee will review and make recommendations to the Board for revisions to the Association's Constitution, By-Laws, and Policies and Procedures Manual. The Planning Committee is composed of the Directors and the Immediate Past President who serves as chair.

**Method of Selection:**

The Planning Committee members are prescribed by the MASFAA By-Laws. Those members include the Directors, who are elected by the membership and serve a three year term, and the Immediate Past President who chairs the committee.

**Responsibilities:**

1. Meet at least annually to conduct a review of the MASFAA Constitution, By-Laws, and Policies and Procedures and make recommendations to the Board for changes as needed.
2. Ensure that the annual goals of the committees and Board are in support of the Long-Range Plan.
3. Review the Long-Range Plan annually to monitor progress toward goal attainment.
4. Evaluate and update comprehensively the Long-Range Plan every five years.