

# Texas Association of Student Financial Aid Administrators



## POLICIES AND PROCEDURES

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## Section 1 INTRODUCTION

The Texas Association of Student Financial Aid Administrator's (TASFAA) policy and procedures manual supplements the Constitution and Bylaws of the Association and is meant to provide an overview of the Association's structure, describe the responsibilities of the Board and committee chairs, and provide guidance and reference used to conduct Association activities.

### 1.1 TASFAA Mission and Vision Statement

The Texas Association of Student Financial Aid Administrators (TASFAA) advances student access to higher education by providing professional development for its diverse members, advocating for informed public policies, and facilitating forums on financial aid topics.

The Texas Association of Student Financial Aid Administrators will serve as an exemplar for promoting student access and success in higher education while also providing excellent professional development opportunities for its members.

Founded in 1969, TASFAA serves multiple roles including:

- **Encouraging** students to pursue higher education.
- **Promoting** student financial aid programs in the post-secondary institutions of the state.
- **Facilitating** communication, activities, services, and professional development among constituencies involved in student financial aid administration in the state.
- **Inspiring** professional competencies in the field of student financial aid administration.
- **Motivating** innovation and creativity in the financial aid field to span all cohorts.

**Encourage, Promote, Facilitate, Inspire, Motivate**

### 1.2 Relationships with Other Associations

#### 1.2.1 Southwest Association of Student Financial Aid Administrators (SWASFAA)

- a. The TASFAA President in office on January 1 shall serve on the SWASFAA Board of Directors through the end of the SWASFAA fiscal year.
- b. TASFAA will provide the state banner for display at the annual SWASFAA conference as well as a door prize for the conference.
- c. TASFAA Awards Chair is to notify SWASFAA Awards Chair of the TASFAA Trailblazer Awardee. In addition, TASFAA will contribute \$250 for matching purposes of the Philo Brasher Emerging Leadership Award and scholarship.
- d. TASFAA will submit the list of its service awards for SWASFAA to use in determining its service awards.

#### 1.2.2 National Association of Student Financial Aid Administrators (NASFAA)

- a. Will participate in Leadership Conference by sending its President-Elect.
- b. Will participate in Regional training by sending trainers and conducting training.

### 1.3 Appropriate Behavior and Non-Discrimination Statement

TASFAA is committed to providing a safe, productive and harassment-free environment at its conferences, trainings, board and committee meetings, and other TASFAA-sponsored events. TASFAA prohibits harassment or discrimination based on race, religion, gender, s e x u a l orientation, gender identity, gender expression, disability, ethnicity, national origin, veteran status, or other protected status. It also prohibits sexual harassment or intimidation, including unwelcome sexual attention, stalking (physical or virtual), or unsolicited physical contact; and threatening behavior.

These conduct rules apply to all attendees and participants at any TASFAA-sponsored event, including online events. Any violations should be reported immediately to a member of the TASFAA board or their designee (e.g., committee chair for an event). We also expect participants to alert venue staff or security of any dangerous situations or of anyone in distress.

TASFAA reserves the right to remove any individual from attendance or other participation in any TASFAA-sponsored event without prior warning or refund, and to take additional action as determined necessary by the TASFAA Board, up to and including expulsion from participation in TASFAA.

1.4 Use of the Manual

At the beginning of each fiscal year, the President will distribute a copy of the TASFAA Policies and Procedures Manual to the Board of Directors [hereafter referred to as 'the Board' in this document] and committee chairs. All members of the Board and committee chairs are responsible for using the manual to perform their duties.

1.5 Updating the Manual

It will be the responsibility of the Constitution and Bylaws Committee or an individual or committee appointed by the TASFAA President to review proposed revisions of the manual for appropriateness as they govern the activities and needs of the Association. These changes will be submitted to the Board for approval and copies distributed accordingly. Amendments to the TASFAA Constitution and Bylaws require adoption by a quorum of the Board per Article VII.

## Section 2 ORGANIZATIONAL STRUCTURE

### 2.1 Board of Directors

The Board of Directors will be the agency that carries out the general administrative and executive functions of the Association. Members of the Board of Directors will exercise reasonable judgment in carrying out the business of the Association and will act in the Association's best interest. The Board is responsible for the management of the property and assets of the Association. The Board shall consist of the following:

- President, President-Elect, Immediate Past President, and eight members elected at large (including the Vice President). The Treasurer and the Secretary are non-voting members.

### 2.2 Committees

The President of the Association shall appoint *ad hoc* committees as deemed necessary to conduct the business of the Association. Unless otherwise specified by the Bylaws of the Association, the President-Elect shall designate the chair elect of each committee. Committees must be comprised of active members of the Association. Members of the committees are selected by the committee chairs and approved by the President.

It is the responsibility of current committee chairs to transfer all committee records and files related to the business of the committee to the succeeding chair before the commencement of the new chair's term of service.

### 2.3 Membership

#### 2.3.1 Types of Membership

The Association consists of three types of membership: voting, associate and individual.

- Any employee of a member institution is considered to be member of TASFAA.
- Any employee of a member institution may attend TASFAA sponsored events at the regular registration fee rate.
- Any person of a member institution may be listed in the TASFAA Directory.
- The TASFAA Board of Directors may deny membership to any organization or member that does not comply with the NASFAA Statement of Ethical Practices as adopted by TASFAA, with generally accepted standards of propriety, and /or does not support the basic tenets of TASFAA and its activities.

#### 2.3.2 Lifetime Membership

The Lifetime Membership category was created as a way to honor two groups of individual members: retirees and TASFAA Hall of Fame members. Lifetime members agree to keep their information up to date online. Lifetime membership for any individual can be revoked by the Board or the program changed by vote of the Board at any time if it is in the best interest of TASFAA. Lifetime Membership information will be added to the TASFAA website and information disseminated on the listserv annually by the Membership Committee.

##### 2.3.2.1 Lifetime Membership Benefits

- Permanent Association membership
- Access to the TASFAA website and listserv
- A 50% discount on conference registration (waived if invited for a special recognition at the conference)

#### 2.3.2.2 Process for Awarding Lifetime Membership

- Hall of Fame Honorees: Automatically granted lifetime membership to TASFAA.
- Financial Aid Retirees: The employee retiring after at least 15 years of service to the financial aid industry requests enrollment as a Lifetime member to the Membership Committee. The Membership Committee recommends approval and forwards to the Board for approval of enrollment.

#### 2.4 Membership Eligibility

Membership shall be institutional rather than individual.

Active membership shall be on an annual basis. Applications for active membership shall be made to the treasurer, and with the membership chair, shall approve those who meet membership criteria. Applications of those who do not appear to meet the membership criteria shall be presented to the Board for approval or disapproval.

#### 2.5 Member Rights

All active and lifetime members are listed annually on the membership roster and provided access to TASFAA materials, training and listserv.

Active members from voting member institutions whose job duties are in support of or engaged in the administration of financial aid are eligible to:

- be elected or appointed to a leadership position;
- serve on Association committees; and
- represent their institution to vote in the annual election of officers (one vote per member institution).

### Section 3: DUTIES AND RESPONSIBILITIES OF THE BOARD

#### 3.1 General Expectations of Board Members

It is expected that Board members will:

- a. In addition to the duties listed in the Constitution and Bylaws, the representatives at large will attend called meetings of the TASFAA Board to act on behalf of the Association.
- b. Vote on Association matters and should solicit input from the membership at large where appropriate.
- c. Attend all Board meetings and remain until the end of the meeting. All Board members unable to attend should notify the President as soon as possible. Any elected board member who has been absent from two (2) consecutive regular meetings of the Board of Directors without just cause as determined by the Board shall automatically vacate the seat on the Board, and the vacancy shall be filled as provided by the Bylaws of the Association. However, the Board shall consider each absence as separate circumstances and may expressly waive such absence by a majority vote of the members present at that meeting.
- d. Serve as leaders in the financial aid profession and set an example for other members of the Association and for external constituencies.
- e. Recognize and uphold all fiduciary responsibility vested in the Board.
- f. Adhere to the policies and procedures adopted by the Association and provide suggestions for change when appropriate.
- g. Actively participate in decisions made by the Board on behalf of the members.
- h. Serve as liaison to committee chair assigned by the President.

#### 3.2 President

The President acts as the chief executive officer of the association, present at all meetings of the association and chairing all meetings of the Board of Directors. In this capacity the President shall:

- a. Provide leadership and direction to all activities of the Association, the Board, and all committees and task forces of the association.
- b. Call as many Board meetings as needed to carry on the business of the Association.
- c. Make an effort to notify Board members of meetings at least one month in advance.
- d. Make at least two written reports (one report for the TASFAA website at beginning of term and one report to be included in the annual report) to the membership each year.
- e. Determine the need for additional *ad hoc* committees and appoint chairpersons to serve during the year.
- f. Serve as the official representative of the association or delegate such responsibility to another officer or other member as may be deemed necessary for groups in the interests of TASFAA.
- g. Represent the Association at Southwest Association of Student Financial Aid Administrators (SWASFAA) Board of Director's meetings or delegate such responsibility to another officer or other member.
- h. Approve expenditures and have authority to pay bills.
- i. Assign current Board Members as liaisons to committee chairs.
- j. Invite Financial Aid Star and Trailblazer recipients to attend TASFAA Board of Directors Meeting.
- k. For the last board meeting of the term, request an annual report from all committees for preliminary preparation of annual report as part of Past President duties.
- l. Update the assessment and goals portion of the TASFAA Strategic Planning throughout term.
  - o Add TASFAA President Comments in an effort to provide a record of Presidential initiatives beyond the scope of TASFAA for the new President to continue if he/she chooses.

### 3.3 President-Elect

The President-Elect assists the President and prepares for his or her term of office. Additional responsibilities of the President-elect include:

- a. Appoint vice-chairpersons of standing committees and any *Ad Hoc* committees which they determine will be on-going. The appointed vice-chairpersons will serve as chairs of their committees during the succeeding year when the President-Elect will serve as President.
- b. Serve as Vice-Chair of the Finance Committee and provide, in collaboration with the Finance Committee, oversight of the fiscal budget throughout the term.
- c. Provide assistance to the President in any areas as requested.
- d. Complete objectives for the TASFAA Strategic Planning for presentation at the July Board Meeting.

### 3.4 Immediate Past President

The immediate Past President assists the President and serves as the Parliamentarian of the Association. In this capacity the Past President will:

- a. Become familiar with *Robert's Rules of Order, Revised* to help the President preside over meetings in an orderly fashion.
- b. Approve expense vouchers in the absence of the President.
- c. Update TASFAA Time Capsule information for the year in which you served as TASFAA President. See [http://www.tasfaa.org/docs/toc\\_timecapsule.html](http://www.tasfaa.org/docs/toc_timecapsule.html).
- d. At the request of the TASFAA Board, coordinate the Financial Aid Summit to discuss current issues when applicable.
- e. Present TASFAA Strategic Plan utilized during TASFAA Presidential term at the December Board meeting.
- f. Chair Nomination and Elections committee.
- g. Coordinate with Communications and Social Media Committee for publication of TASFAA Annual Report.

### 3.5 Vice President

The Vice President is elected by the Board at its first meeting of the fiscal year. In this capacity, the Vice President will:

- a. Assist the President as needed.
- b. Serve as Acting President whenever the President is unable to perform the duties of the office.
- c. Administer volunteers to collect and disseminate TASFAA volunteer forms, coordinate with web services on online form availability, notify committee chairs of volunteers willing to serve and ensure all volunteers are utilized.
- d. Coordinate all preparations for Board meetings. This includes requesting and collecting committee & partner reports & developing the board meeting agenda.
- e. Responsible for storing, transporting, and providing the TASFAA projector for all TASFAA Board of Director's meetings.

### 3.6 Secretary

The Secretary is a non-voting member of the Board and is appointed by the President. The Secretary also serves as the scribe for the Association. Duties include:

- a. Taking minutes of the annual meeting of the membership.
- b. Taking minutes of each Board meeting.
- c. Submitting minutes to each Board member for approval. Minutes of official meetings should be made available to the membership by being posted to the web within two weeks of the meeting.

### 3.7 Treasurer

The Treasurer is a non-voting member of the Board and is appointed by the President. The term of Treasurer will be for one year. The Treasurer serves as a liaison between the TASFAA Board and contracted Bookkeeper/Accountant for TASFAA.

Duties include:

- a. Keeping the financial records of the Association by maintaining adequate and appropriate records of receipts and expenditures.
- b. Receiving all payments to the Association including meeting registrations, membership dues, and sponsorship payments.
- c. Making reports to the Board (or Executive Committee or Financial Committee). Upon approval of these reports by a quorum of the Board, they will be distributed to the membership by posting to the TASFAA website.
- d. Opening and maintaining such commercial bank accounts in the name of the Association as deemed necessary by the Board. All disbursements of the Associations funds shall be made by check initiated and signed by the Treasurer upon approval from the President (or President-Elect).
- e. Obtaining credit for the Association as appropriate.
- f. Filing all required IRS forms for the fiscal year and all financial records in a proper and timely manner.
- g. Maintaining the records of the Association's corporate registration on file with the Texas Secretary of State. This includes updating the names of the corporate officers and the corporate address of the association at the start of each two year term or earlier if requested by the Secretary of State.
- h. Ensuring the financial records of the Association will be audited each year by a firm selected by the Board.
- i. Ensuring all bank and investment accounts are reviewed monthly and changes made as approved by a quorum of the Board.
- j. Paying the bills of the Association promptly.
- k. Processing expense vouchers promptly upon approval from the President and sign association checks for payment.
- l. Review bank activity on a monthly basis with the Bookkeeper/Accountant.

### 3.8 Public Policy

- a. The President, President-Elect, Immediate Past President or representatives of the Board of Directors shall serve the capacity of addressing public policy on behalf of TASFAA.

## Section 4 DUTIES AND RESPONSIBILITIES OF COMMITTEES

The committee chairs should work to select committee members considering experience, diversity and sector interests. Accepting the appointment to chair a committee is a three year commitment as follows: first year as Vice-Chair, second year as Chair, and third year as Past-chair. Each committee shall:

- develop goals and objectives in keeping with committee charges, the Bylaws, the mission of the Association, and long-range plan;
- submit articles to the newsletter editor and submit updates of activities for publication on the TASFAA website;
- prepare and submit reports to the Vice President, make reports, and submit actions items at Board meetings;
- comply with budget parameters and approve expenditures and requests of reimbursement in accordance with Association guidelines; and
- forward to their successor all pertinent records and reports by November 1 and, in the event of a committee chair's resignation or removal from office, all records must be submitted to the successor or the Association President within 30 days.

### 4.1 Committees

Committees, comprised of active members of the Association, are established to perform specific functions for the organization. These committees also may be structured to provide specific services to the membership of the Association. Specific committees continue on an ongoing basis as "Standing" committees of the Association, while other "Ad Hoc" committees may be established to accomplish special functions that may not continue from one administration to the next.

\*See Appendix D, Duties and Responsibilities of TASFAA Committees for committee purpose and responsibilities.

#### 4.1.1 Standing Committees

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

Fall Conference	Finance
Membership	Nominations and Elections
Training	

#### 4.1.2 Ad Hoc Committees

*Ad Hoc* committees are those that the Board recognizes as being necessary to fulfill distinct needs of the Association. However, the President has the discretion whether to activate these committees from one administration to the next. The President, with approval of the Board, may identify additional *Ad Hoc* committees or Task Forces as the needs of the Association warrant.

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

*Ad Hoc* committees generally include the following:

- Awards and Scholarship Committee, Web Services, Constitution and Bylaws Committee, Early Awareness Committee, Communications and Social Media Committee, Regional Training Committee, Site Selection Committee, Legislative Issues Committee, SWASFAA Relations

## Section 5 GIFTS AND AWARDS

### 5.1 Gifts and Amenities

The president shall have the discretion to present gifts and/or amenities to selected persons or groups to demonstrate the appreciation or gratitude of the Association. Amounts over the board discretionary line item require board approval.

### 5.2 Memorial Policy

Memorials and/or floral arrangements are appropriate for financial aid colleagues who have made significant contributions to the financial aid profession through commitment to the organization(s) TASFAA, SWASFAA, and NASFAA by holding office(s), committee involvements, or as an advocate. Authority to make such arrangements will be made by the President or their designee.

#### 5.2.1 Funerals/Memorial Charitable Donations

At the death of a financial aid colleague, as described above, it is appropriate to send a floral arrangement to their services on behalf of TASFAA. Floral arrangements should be limited to a reasonable amount at the discretion of the purchaser. If the deceased or their families have requested a memorial contribution, or a donation to a TASFAA scholarship fund, contributions should be commensurate with colleague's contributions and experience.

### 5.3 Recognition of Service to TASFAA

At the annual conference each year, recognition of service awards to TASFAA will be awarded.

#### 5.3.1 Outgoing President

A plaque suitably inscribed to recognize service will be presented to the outgoing President by the President-Elect.

#### 5.3.2 Board and Committee Service

Recognition of service will be given by the out-going President to each member of the Board and each Chairperson of the Standing and *Ad Hoc* Committees.

#### 5.3.3 Years of Service

Beginning with 10 years, and continuing with 5-year increments (November 1 – October 31), pins will be given to individual TASFAA members recognizing their years of service within financial aid. (Years of service includes part-time work study in financial aid.) Pins will be presented to members in good standing during their milestone year. The pins will be distributed to members at the annual conference at the end of that year. Pins will be mailed shortly after the conference to members unable to attend the annual conference.

#### 5.3.4 TASFAA Hall of Fame

The TASFAA Hall of Fame is an honorary group of current or former financial aid administrators who have served in Texas and who have been designated by TASFAA as having been exceptional in their dedication and service to TASFAA and the students of Texas. No more than two awards will be granted annually to retain the value and exclusiveness of the award. Nominees not selected are eligible and encouraged to be re-nominated.

- A plaque suitably inscribed will be presented to TASFAA Hall of Fame inductees
- Each new inductee name shall be inscribed and added to the list of previous inductees on the permanent plaque located in the TASFAA archives and listed in Association Directory as well as and posted on the TASFAA website
- Each new inductee will receive a diamond studded, gold lapel pin that bears the name TASFAA above the abbreviation HOF.
- Hall of Fame honorees will automatically be granted lifetime membership to TASFAA

##### 5.3.4.1 Hall of Fame Award Categories

- Service to TASFAA – Must currently be or was affiliated with a school and meet membership criteria.
- Friend of TASFAA – Has demonstrated a commitment to TASFAA's mission in

the financial aid community, but is not from a school.

- Unsung Hero of TASFAA – Recognizes a staff member that epitomizes TASFAA and the financial aid profession in their everyday work.

#### 5.3.4.2 Hall of Fame Criteria

- a. Seniority: An inductee must have worked in financial aid administration for at least twenty years, a minimum of fifteen in Texas, for the benefit of Texas students.
- b. Membership: An inductee must have been a member of TASFAA for at least three years and have served as an officer or committee member or any other ad hoc position formally created by the President of the Board. The Service to TASFAA category requires at least five years of service.
- c. Commitment: An inductee must demonstrate an untiring commitment to encouraging qualified students to pursue higher education by assisting them in obtaining the financial aid they need to achieve this goal.
- d. Integrity: An inductee's behavior must have demonstrated a high standard of excellence when advising needy families, administering public funds, representing the school and working with colleagues.
- e. Practice: An inductee's actions must have resulted in lasting improvements in the policies and procedures of financial aid administration.

#### 5.3.4.3 Nomination Procedures

- a. The sponsor should obtain the permission of the nominee prior to submitting the nomination. The sponsor will submit a biography of the nominee, a letter indicating the category and reasons for nomination of this honor, and letters of support. Nominations and documents must be sent to the Chair of the Awards Committee by the required deadline.
- b. The Awards Committee will review nominations along with supporting documents and make its final recommendations to the Board of Directors at the July Board Meeting. A list of all nominees will be provided to the Board and why or why not recommended by Awards Committee.

#### 5.3.5 Trailblazer Award

This award recognizes the “up and coming leader” of the association. It is to be selected annually by the TASFAA officers and Board. The Trailblazer must be a member of TASFAA and must have served TASFAA during the last three years, serving the higher education arena and students with creative energy, dedication, and commitment.

- a. The Trailblazer recipient will be approved by the TASFAA Board of Directors during the July meeting.
- b. The TASFAA Trailblazer recipient will be recognized during the awards ceremony at the annual TASFAA conference. A plaque suitably inscribed to recognize service will be presented to the TASFAA Trailblazer. In addition a letter is to be prepared explaining the privileges of the award.
- c. TASFAA will pay travel, hotel and meal expenses (excluding alcoholic beverages) of the Trailblazer award winner to the annual SWASFAA Conference as well as the NASFAA Leadership Conference. In addition TASFAA will contribute \$250 to SWASFAA to be matched by \$250 from SWASFAA for a total of \$500 in scholarship funds to award students at the Trailblazer's home school.
- d. TASFAA Awards Chair will notify SWASFAA Awards Chair of the TASFAA Trailblazer Awardee to be recognized as Texas' Philo Brasher Emerging Leadership Award recipient at the annual SWASFAA Conference.

### 5.3.6 Financial Aid Star Award

This award recognizes outstanding efforts in the area of advising students by an individual in a front line position in the financial aid office of a TASFAA member school. The emphasis of the counseling efforts should be the area of financial aid and budgeting. Other areas of counseling that would benefit students will also be considered. Nominees should exemplify professionalism, innovation in advising students, use a number of communication methods to counsel students, go above and beyond the normal duties, and have worked in the financial aid industry for at least two years.

- a. A letter nominating the advisor and two letters of recommendation are required. One letter of recommendation must be from a student. If the nominating letter is not written by the school, then the second recommendation letter must be written by a representative from the nominees' school.
- b. A list of all nominees will be provided to the Board and why or why not recommended by Awards Committee.
- c. The TASFAA Financial Aid Star recipient will be recognized during the awards ceremony at the annual TASFAA conference. A plaque suitably inscribed to recognize service will be presented to the TASFAA Financial Aid Star. In addition, a letter is to be prepared explaining the privileges of the award.
- d. TASFAA will provide a \$500 training voucher for recipient. Voucher must be used by September 30<sup>th</sup> of year following award, and should be used for financial aid training such as the SWASFAA Mid-Level Training or other appropriate event. Recipient may submit training opportunity to the Board prior to registration or attendance for approval by the Board. Funds will be reimbursed to the school or the award winner, as applicable, upon proof of payment from the school or winner. Funds do not all have to be used for a single training, but can be used multiple times until \$500 is exhausted.

### 5.3.7 Teaching and Mentoring Award

This award recognizes someone who has demonstrated a commitment to teaching and mentoring other FAA professionals over a sustained period of time. Nominees should exemplify professionalism, a commitment to teaching/mentoring and have worked in the financial aid industry for at least 5 years.

A letter nominating the individual and two letters of recommendation (at least one from someone who was mentored by this individual) are required. Attach all documentation to the TASFAA Award Nomination Form and send to the Chair of the Awards Committee by the deadline in June.

A list of all nominees will be provided to the Board and why or why not recommended by the Awards and Scholarships Committee.

The TASFAA Teaching and Mentoring Award recipient will be recognized during the awards ceremony at the annual TASFAA conference. A plaque suitably inscribed to recognize service will be presented. In addition, a letter is to be prepared explaining the privileges of the award.

TASFAA will pay travel, hotel and meal expenses (excluding alcoholic beverages) up to \$1,000 of the Teaching and Mentoring award winner for the annual TASFAA Conference the following year.

### 5.3.8 Financial Aid Support Award

This award recognizes outstanding efforts by an individual in a back office support role (not front line). Nominees should exemplify professionalism, innovation, go above and beyond the normal duties, and have worked in the financial aid industry for at least two years.

A letter nominating the individual and two letters of recommendation are required. Attach all documentation to the TASFAA Award Nomination Form and send to the Chair of the Awards Committee by the deadline in June.

A list of all nominees will be provided to the Board and why or why not recommended by the Awards and Scholarships Committee.

The TASFAA Financial Aid Support Award recipient will be recognized during the awards ceremony at the annual TASFAA conference. A plaque suitably inscribed to recognize service will be presented. In addition, a letter is to be prepared explaining the privileges of the award.

TASFAA will provide a \$500 training voucher for recipient. Voucher must be used by September 30<sup>th</sup> of the year following award, and should be used for financial aid training.

## 5.4 Professional Development Scholarships

The Mack C. Adams professional development scholarship was created to assist financial aid professionals' financial participation in professional opportunities. Mack C. Adams was instrumental in creating the Texas Association of Student Financial Administrators (TASFAA) and served as its first president from 1968 to 1969. He continued to serve the Association as a member until his retirement in July 1995.

#### 5.4.1 Availability of Scholarship Funds

The amount of funds available for scholarships will be determined annually by the Board in its budget approval process. The Committee is not obligated to award all of the funds, if there are not candidates who meet the criteria. However, all funds can be awarded if enough applicants apply and meet the eligibility criteria. Funds will be budgeted to ensure availability for all sponsored events. The Committee has the discretion to determine the number of scholarships given and the amount of the scholarships.

#### 5.4.2 New Aid Officers' Workshop (NAOW) Scholarship Criteria

- a. The applicant has not previously attended NAOW.
- b. The applicant's institution is a 'current' paid member of TASFAA.
- c. The applicant has worked in financial aid less than two years, or the applicant's responsibilities have recently changed adding new responsibilities.

#### 5.4.3 ABC Workshop Criteria

- a. The applicant was not a recipient in the previous year.
- b. The applicant's institution is a 'current' paid member of TASFAA.
- c. Preference will be given to applicants demonstrating a special need for assistance to attend the annual conference as documented through the application process and determined by this Committee.

### 5.5 ATLE-TASFAA Education Scholarship

The Association of Texas Leaders for Education (ATLE) has provided scholarship funds which are designed to provide financial support for TASFAA members pursuing a higher education.

#### 5.5.1 Availability of Scholarship Funds

The amount of funds available for scholarships will be determined annually by the ATLE Board. The application process will be completed through the ATLE website and applications will be available from February 1st through April 1st. Applications will be reviewed by the TASFAA Awards and Scholarships Committee. Upon completion of their review, the committee will communicate their recommendation as well as an alternate candidate to ATLE and the Foundation.

#### 5.5.2 Scholarship Criteria

- a. Be a current member of the Texas Association of Student Financial Aid Administrators (TASFAA)
- b. Intend to enroll at least as a half-time student (e.g., a minimum of 6 credit hours for an undergraduate) during the upcoming fall semester at an accredited Texas college, university or technical school
- c. Intend to enroll with the purpose of earning a degree
- d. Demonstrate service to TASFAA or the community
- e. Provide a positive personal reference letter from a current employer, community leader or leader within TASFAA (i.e., board member, committee chair, etc.)
- f. Preference for those with financial need

## **Section 6 FINANCIAL**

Maintaining the financial stability of the Association is paramount to ensuring its continued viability and service to its membership. This section sets basic parameters for financial controls.

### 6.1 Membership Dues

The Board reviews the annual dues to TASFAA each fiscal year. The membership rate is subject to change in accordance with provisions in the Constitution and Bylaws.

## 6.2 Conference, Events, and Workshop Fees

Fees for the annual conference and other professional development activities shall be set on an annual basis by the Board upon the recommendation of the respective committee chairs.

### 6.2.1 Conference Fee Waivers

TASFAA will waive conference registration fees of the Conference Chair for the respective Conferences they are serving.

### 6.2.2 Refund Policy

- a. All request for cancellations and refunds must be in writing and be submitted to the Treasurer.
- b. Refunds will be processed as follows:
  - 100% if request received at least 14 calendar days prior to the event
  - 75% if received at least 7 calendar days prior to the event
  - 25% if received up to 6 calendar days prior to the event
- c. Exceptions for extenuating circumstances to item b. above may be granted upon approval of the Treasurer and President. All requests must be received within seven calendar days after the activity.
- d. Substitutions will be allowed upon request.

## 6.3 Investment Policy

The Treasurer will keep cash on hand in amount sufficient to meet expenses and to prevent overdrafts or service charges. Investments, stocks, bonds, and certificate of deposit amounts and distribution will be monitored by the Board.

### 6.3.1 Investment Portfolio

The TASFAA Board will maintain an investment portfolio with the primary goal of ensuring a sufficient level of investments to sustain the organization's activities for a minimum of two years. The TASFAA Board will annually review and approve the investment strategy of its investment manager. In addition, the TASFAA Board will review and act on any recommendations its investment manager presents at the quarterly Board meetings.

When it is determined that an investment withdrawal is warranted to support an activity of the TASFAA organization, it will be done on an as needed basis as determined and approved by the Board.

## 6.4 Guidelines for Travel and Other Expenditures

- a. TASFAA covers expenses for Board members and committee members who attend called meetings of the respective committee or Board. Receipts for these expenses (except phone) must be submitted for reimbursement.
- b. Expenses for travel for board or committee members for travel other than called meetings must be approved by the appropriate committee chair and TASFAA President prior to the expenses being incurred.
- c. All significant expenses for the Association should be approved by the TASFAA Board prior to creating an obligation for the Association. Reimbursement of expenses incurred on behalf of TASFAA must be authorized by the Committee Chair, then the President and Treasurer before payment is made.
- d. The "TASFAA Expense Voucher" form shall be updated annually to include the current rate of reimbursement for mileage and describe in detail the "TASFAA Reimbursement Guidelines".

#### 6.4.1 Approved Expenses

##### 6.4.1.1 Meals (Excluding Alcohol)

Actual costs of meals up to \$35 per day will be reimbursed. Receipts must be attached for expenses above \$10. Reimbursements will not be made when meals are furnished by or through TASFAA.

##### 6.4.1.2 Transportation

When traveling by air, individuals shall travel air coach except in those cases when scheduling difficulties or other considerations make first-class travel desirable or necessary. Air fare must be itemized on the expense voucher and documented by attaching ticket information. If the use of a private car is authorized, reimbursement shall be at the State of Texas reimbursement mileage rate. Normally, this may not exceed the cost of air coach fare. In circumstances when use of a car is preferred for personal reasons, mileage shall be limited as above. Committee chairs will work closely with the President as well as individual committee members to utilize the most economical and feasible means of travel. Reimbursement of a rental vehicle is not allowed without prior written authorization from the President. A copy of the approval should be submitted with the reimbursement request.

##### 6.4.1.3 Lodging

Lodging paid by TASFAA outside scheduled event time must have written justification when submitted for payment. Actual hotel expenses (not including room service, movies, etc.) will be reimbursed.

##### 6.4.1.4 Taxi or Bus Service

Ground transportation to and from the meetings, lodging facilities, and airport will be approved provided these expenses are reasonable and were incurred in transportation to and from meetings, lodging, and the airport.

##### 6.4.1.5 Other Expenses

Any other expense deemed necessary and pre-authorized by the committee chair can include such things as printing, postage, and supplies.

#### 6.4.2 Signature Authority

Signature authority for contracts encumbering expenses of the Association for any of its activities (e.g., hotel for conferences, facilities for training, or other contractual services) is the President's or his/her designee.

#### 6.4.3 President's Expenses

TASFAA will pay travel, hotel, meal (excluding alcoholic beverages), and conference fee expenses of the President to attend the annual TASFAA conference, the annual SWASFAA conference, the annual NASFAA conference, and travel to other professional activities where the President is an invited guest representing the Association. President's travel expenses are approved by the immediate past President.

#### 6.4.4 President-Elect's Expenses

TASFAA will pay travel, hotel, meal (excluding alcoholic beverages), and conference fee expenses of the President-Elect to attend the annual TASFAA conference, the annual SWASFAA conference, the annual NASFAA conference, the annual NASFAA leadership conference, and travel to other professional activities where the President-Elect is an invited guest representing the Association.

#### 6.4.5 Immediate Past President's Expenses

TASFAA will pay travel, hotel, meal (excluding alcoholic beverages), and conference fee expenses of the Immediate Past President to attend the annual SWASFAA conference and travel to other professional activities where the Past President is an invited guest representing the Association.

#### 6.4.6 Treasurer's Expenses

TASFAA will pay travel, hotel and meal expenses (excluding alcoholic beverages) of the Treasurer to attend any meeting that is deemed necessary for the Treasurer to attend by the President or the Board.

#### 6.4.8 Secretary's Expenses

TASFAA will pay travel, hotel, and meal expenses (excluding alcoholic beverages) of the Secretary to attend any meeting that is deemed necessary for the Secretary to attend by the President or the Board.

#### 6.4.9 Representatives at Large Expenses

TASFAA will pay travel, hotel, and meal expenses (excluding alcoholic beverages) of each of the TASFAA Representatives at Large to attend all Board meetings not held during a regularly scheduled TASFAA Conference and any other meeting that is deemed necessary by the TASFAA President.

#### 6.4.10 Guest Speakers/Faculty Expenses

TASFAA will pay guest speakers/ faculty for contributions to conferences and/or training sessions as approved by vote of a quorum of the Board.

#### 6.4.11 Trailblazer Awardees Expenses

TASFAA will pay travel, hotel and meal expenses (excluding alcoholic beverages) of the Trailblazer award winner to the annual SWASFAA Conference as well as the NASFAA Leadership Conference.

#### 6.4.12 Financial Aid Star Awardees Expenses

TASFAA will provide a \$500 training voucher for recipient.

#### 6.4.13 SWASFAA President Expenses

TASFAA will pay registration fee and lodging expenses of the SWASFAA President to attend the TASFAA conference as approved by vote of a quorum of the Board.

#### 6.4.14 NASFAA Representatives Expenses

TASFAA will pay the registration fee and lodging expenses of the NASFAA National Chair, the NASFAA President, and other NASFAA staff as approved by vote of a quorum of the Board.

### 6.5 Reimbursement Procedures

- a. Expense vouchers must be signed by the claimant, by the appropriate committee chair, and the President. Claimants should attach all itemized documentation to include airline ticket itineraries, hotel receipts, meal receipts over \$10, and parking receipts, etc. Documents may be faxed to the TASFAA Treasurer. Scanned and emailed vouchers with documentation are also acceptable.
- b. Claimant as well as appropriate committee chair should keep copies of expense vouchers.
- c. Reimbursement of the President's expenses must be approved by the immediate past-president.
- d. If the appropriate committee chair and/or President have not signed the submitted voucher, the Treasurer must document approval via an e-mail from the appropriate people authorizing the requested reimbursement of the expenses.
- e. Completed expenses vouchers should be submitted within 30 days of the expense but in no case later than the end of the applicable fiscal year.

### 6.6 Credit Card Use

Credit cards are secured for the President, President-Elect, Past President, Treasurer, and Vice President to cover expenses associated with performing their duties.

- a. The Treasurer shall secure credit cards for official TASFAA business use by the specified officers.
- b. Credit lines will be established as deemed necessary for each holder of a card.
- c. All expenses charged to a credit card must be reported by the user and must correspond to a valid receipt.
- d. Charging personal expenses to the Association credit card is prohibited.
- e. Violation of card use policies may result in cancellation of credit card privileges.

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

**Section 7 APPENDIX**

- 7.1 Appendix A – TASFAA Resolution

**A RESOLUTION  
Of the  
Board of Directors of the Texas Association of Student Financial Aid Administrators (TASFAA)**

WHEREAS, we, as leadership of TASFAA and as individuals dedicated to the profession of student financial aid administration, commend the NASFAA Board of Directors for their diligent work in expanding upon NASFAA's Statement of Ethical Principles in regard to members' ethical behavior and potential conflicts of interest,

WHEREAS, we continue to strive to serve as an example of highest ethical standards in our state,

WHEREAS, we continue to affirm that our primary focus is providing accurate and timely information on the student aid process to our enrolled and prospective students as well as in the actual processing of that aid,

NOW, THEREFORE, BE IT RESOLVED that the TASFAA Board of Directors:

- Shall encourage all TASFAA members, as financial aid professionals, to become familiar with NASFAA's *Statement of Ethical Principles and Code of Conduct for Institutional Financial Aid Professionals* and apply it as appropriate in accordance with their own employer's conflict of interest policies;
- Shall offer sessions on ethics and the possible changing of office policies and procedures at future training venues;
- Shall review TASFAA policies related to sponsors and/or exhibitors and make recommendations for any changes at the October 2007 Board Meeting.

Unanimously adopted July 25, 2007

7.2 Appendix B – TASFAA Finance Calendar

TASFAA Finance Calendar.....Created August 2009; Updated September 2013; Updated January 2016

The purpose of this calendar is to serve as a tool to help identify association expenditures as well as to assure business forms and renewals are completed in a timely manner.

TASFAA Finance Calendar

as of 01/01/2016

<b>Item</b>	<b>Amount</b>	<b>Timeframe</b>	
Commercial Liability Coverage	\$1,400 (approximately)	May	
Non-Profit Director Officer/Employment Practices & Crime Coverage	\$2,000 (approximately)	September	
1099-M Reports for Contract Labor		January	
Monthly Credit Card Usage Fees	Varies	Monthly	
Annual Audit Board Approves Audit Firm President Signs Annual Audit Engagement Letter Audit Fee File 990 as part of the annual audit	\$2,700 (approximately)	October November December/January	
State Periodic Report for Non-Profit Form 802		Every 4 years	filed 2008
ATAC Services Contract	\$335.00 Monthly		
Review all outstanding conference contracts		October	
Add and delete approved credit card holders		November	
Send President Copy of Bank Statement		Monthly	

7.3 Appendix C – Duties and Responsibilities of TASFAA Officers:

<b>TASFAA Officers</b>		
<b><u>Officer</u></b>	<b><u>Purpose</u></b>	<b><u>Responsibilities</u></b>
Board Member	Members of the Board of Directors will exercise reasonable judgment in carrying out the business of the Association and will act in the Association’s best interest. The Board is responsible for the management of the property and assets of the Association.	<ul style="list-style-type: none"> <li>▪ Attend all Board meetings and remain until the end of the meeting. All Board members unable to attend should notify the President as soon as possible. Any elected board member who has been absent from two (2) consecutive regular meetings of the Board of Directors without just cause as determined by the Board shall automatically vacate the seat on the Board, and the vacancy shall be filled as provided by the Bylaws of the Association. However, the Board shall consider each absence as separate circumstances and may expressly waive such absence by a majority vote of the members present at that meeting.</li> <li>▪ Serve as leaders in the financial aid profession and set an example for other members of the Association and for external constituencies.</li> <li>▪ Recognize and uphold all fiduciary responsibility vested in the Board.</li> <li>▪ Adhere to the policies and procedures adopted by the Association and provide suggestions for change when appropriate.</li> <li>▪ Actively participate in decisions made by the Board on behalf of the members.</li> <li>▪ Serve as liaison to committee chair assigned by the President.</li> </ul>
		<p><b><u>Monthly Calendar Activities</u></b></p> <ul style="list-style-type: none"> <li>▪ October – Attend Board Meeting in conjunction with TASFAA Fall Conference.</li> <li>▪ December – Attend Board Meeting.</li> <li>▪ February – Attend Board Meeting.</li> <li>▪ May – Attend Board Meeting.</li> <li>▪ July – Attend Board Meeting.</li> </ul>

**TASF<sup>AA</sup> Officers**

<b><u>Officer</u></b>	<b><u>Purpose</u></b>	<b><u>Responsibilities</u></b>
Secretary	The Secretary is a non-voting member of the Board and is appointed by the President. The Secretary also serves as the scribe for the Association.	<ul style="list-style-type: none"><li>▪ Taking minutes of the annual meeting of the membership.</li><li>▪ Taking minutes of each Board meeting.</li><li>▪ Submitting minutes to each Board member for approval. Minutes of official meetings should be made available to the membership by being posted to the web within two weeks of the meeting.</li></ul> <b><u>Monthly Calendar Activities</u></b> <ul style="list-style-type: none"><li>▪ October - Transcribe minutes for October Board Meetings and TASF<sup>AA</sup> Business Meeting. Recognize TASF<sup>AA</sup> award recipients in the minutes of the 1st Board Meeting for the new TASF<sup>AA</sup> year. Recognize VP, Treasurer, and Secretary Appointments and nominations. Prepare TASF<sup>AA</sup> contact list. Prepare TASF<sup>AA</sup> Letterhead.</li><li>▪ December – Transcribe minutes for December Board Meeting.</li><li>▪ February – Transcribe minutes for February Board Meeting.</li><li>▪ May – Transcribe minutes for May Board Meeting.</li><li>▪ July – Transcribe minutes for July Board Meeting.</li></ul> <p>As Necessary –</p> <ul style="list-style-type: none"><li>▪ Publish to TASF<sup>AA</sup> site – motions passed outside of scheduled Board Meetings.</li><li>▪ Assist Officers and Board Members as necessary.</li></ul>

**TASF<sup>AA</sup> Officers**

<b>Officer</b>	<b>Purpose</b>	<b>Responsibilities</b>
Treasurer	Non-voting member that serves as liaison between the TASF <sup>AA</sup> Board and the contracted Bookkeeper/Accountant for TASF <sup>AA</sup> .	<p>*Keeping/Maintaining of financial records of the Association and appropriate records of receipts and expenditures.</p> <p>*Making reports to the Board at all called Board meetings, and at any other time requested by the President. These reports, upon approval, should be made available to the membership on the TASF<sup>AA</sup> website.</p> <p>*Ensure financial records (bank/investment accounts) are reviewed monthly.</p> <p>*Treasurer will receive expense vouchers, obtain necessary approvals, and send to bookkeeper for payment.</p> <p>*Review bank activity with Bookkeeper/Accountant on a monthly basis.</p> <p><b>Monthly Calendar Activities</b></p> <ul style="list-style-type: none"> <li>▪ October-attend meeting for monthly report to TASF<sup>AA</sup> Board during 1<sup>st</sup> Board meeting (TASF<sup>AA</sup> Conference). Observe and learn from previous treasurer.</li> <li>▪ December-present monthly report for December Board Meeting. Upon approval, upload information to membership via TASF<sup>AA</sup> website.</li> <li>▪ February-present monthly report for February Board Meeting, upload to TASF<sup>AA</sup> site upon approval.</li> <li>▪ May-present monthly report for May Board Meeting and upload to TASF<sup>AA</sup> site upon approval.</li> <li>▪ July-present monthly report for July Board Meeting and upload to TASF<sup>AA</sup> site upon approval.</li> </ul>
Bookkeeper/Accountant	Perform accounting services for TASF <sup>AA</sup> .	<p>Monthly responsibilities include:</p> <p>*Bookkeeping, bank reconciliation, unaudited financial statement preparation, coordinating independent audit with auditor as voted upon by the Client Board, and additional Accounting services if TASF<sup>AA</sup> so requests and if Accountant agrees to do so.</p>

<u>Standing Committee</u>		
<u>Committee</u>	<u>Purpose</u>	<u>Responsibilities</u>
Fall Conference	The Fall Conference Committee will plan, produce and administer the annual conference designed to meet the needs and expectations of the membership.	<ul style="list-style-type: none"> <li>■ Prepare a budget for the annual conference which includes: 1) expenditures; 2) recommended on-time and late registration fees; 3) expected revenues from registration fees; and 4) vendor participation. The conference budget and fees must be approved by a quorum of the Board.</li> <li>■ Solicit proposals to develop general and interest sessions and secure speakers that appeal to the various sectors and experience levels of the membership.</li> <li>■ Review evaluations from the prior year conference to assess interest and need for appropriate adjustments for current conference plans.</li> <li>■ Coordinate conference activities with the sponsorship, training, and local arrangements committees as well as working closely with the site personnel to coordinate events.</li> <li>■ Secure volunteers to help perform the duties of the committees.</li> <li>■ Maintain all related correspondence and materials.</li> <li>■ Prepare a conference evaluation for use by the next conference chair.</li> <li>■ Provide articles and promotional material for conference electronic announcements.</li> <li>■ Report on activities and progress of conference preparations to the Board.</li> <li>■ Work closely with the site personnel to coordinate meeting rooms, meals, functions, etc.</li> <li>■ Plan conference agenda to provide a fun atmosphere of learning for the membership.</li> <li>■ Forward items of importance for posting to the Communication and Social Media Committee.</li> </ul> <p><b><u>Monthly Calendar Activities</u></b></p> <ul style="list-style-type: none"> <li>■ October – Fall Conference</li> <li>■ December – Present budget to Board for adoption. Identify committee membership and notify potential members.</li> <li>■ February – Prepare proposal for Board of potential expenses and proposed conference fee. Select theme, list of major speakers, interest sessions topics/descriptions and tentative presenters. Identify possible extracurricular activities. Identify possible menus. Produce a list of special gift options. Present to Board costs and recommend the conference fee. Contact speakers, moderators, and presenters.</li> <li>■ March – Contact Web Services Committee to develop and update the conference mini-site. Communicate with speakers, moderators, presenters. Provide a copy of session description and obtain audio/visual needs. (Add Hall of Fame section for Registration.)</li> <li>■ April – Submit information and script to Web Service for online mini-site. Confirm sponsorships for extracurricular activities, breaks, meals, speakers, etc. Update session descriptions with presenter input.</li> <li>■ May – Contact Web Services requesting online registration information and development. Finalize social events.</li> <li>■ June – Produce registration email materials.</li> <li>■ September – Print and deliver the program to local arrangements committee as well as publish online.</li> </ul>

**Standing Committee**

<b><u>Committee</u></b>	<b><u>Purpose</u></b>	<b><u>Responsibilities</u></b>
Finance	The Finance Committee will be comprised of the President, President-Elect, Treasurer, Bookkeeper, and Investment Advisor. The committee will be co-chaired by the President and the President-Elect. The purpose of the committee is to oversee the financial position of the Association and make recommendations as necessary to ensure its financial stability.	<ul style="list-style-type: none"><li>■ Supports the activities performed by the Treasurer and Bookkeeper.</li><li>■ When deemed necessary by any officer, advise the Board regarding short-term and long-term investments in conjunction with the Association’s financial advisor.</li><li>■ In conjunction with the Treasurer, ensure that all financial reports including tax returns are filed by established deadlines.</li><li>■ If assistance is requested by the Treasurer, or deemed necessary by any officer, the Finance Committee can oversee the annual audit.</li><li>■ If requested by the President or President-Elect, conduct reviews of cash balances and expenses and make appropriate recommendations to the Board.</li><li>■ Forward items of importance for posting to the Communication and Social Media Committee.</li></ul>
		<b><u>Monthly Calendar Activities</u></b> <ul style="list-style-type: none"><li>■ October – If requested by the President, assist with presentation of budget to Board</li><li>■ Update the Board as necessary.</li></ul>

**Standing Committee**

<b><u>Committee</u></b>	<b><u>Purpose</u></b>	<b><u>Responsibilities</u></b>
Membership	The purpose of the Membership Committee is to maintain an accurate database listing of members and to increase the membership of the Association.	<ul style="list-style-type: none"> <li>▪ Review membership information on the website at the beginning of each fiscal year.</li> <li>▪ Actively maintain the recruitment process utilizing the membership database.</li> <li>▪ Verify institutions are “Voting” members.</li> <li>▪ Verify non-institutions are “Associate Members”.</li> <li>▪ Make sure all institutions have a “Primary Contact” person for voting purposes.</li> <li>▪ Work with elections committee to cleanup any bad email addresses and/or primary contact information in the database.</li> <li>▪ Implement actions necessary to encourage eligible institutions to join and remain members of the Association.</li> <li>▪ Review annually the membership directory system on the website and ensure it is collecting the information necessary to meet the needs of the Association.</li> <li>▪ Forward items of importance for posting to the Communication and Social Media Committee.</li> </ul> <p><b><u>Monthly Calendar Activities</u></b></p> <p>Every three years, send member institutions a list of staff to verify which ones are still current (starting with 2014).</p> <ul style="list-style-type: none"> <li>▪ October – Send out first renewal reminder to all primary contacts.</li> <li>▪ December – Send second renewal reminder.</li> <li>▪ March – Email attendees from Regional Trainings regarding TASFAA membership.</li> <li>▪ April – Begin delinquent renewal contract project and prepare for new membership drive.</li> <li>▪ June – Continue renewal/new membership call project and send out reminder about fall conference.</li> </ul>

**Standing Committee**

<b><u>Committee</u></b>	<b><u>Purpose</u></b>	<b><u>Responsibilities</u></b>
Nominations and Elections	The Nominations and Elections Committee presents a slate of candidates who meet the criteria for elected office.  Chaired by the Past President or appointee by the President.	<ul style="list-style-type: none"><li>■ Solicit nominations for open positions from the membership through the TASFAA email the TASFAA website no later than April 1.</li><li>■ Ensure there are a sufficient number of candidates nominated for each office.</li><li>■ Review nominations to ensure single voting institution representation, diverse school mix representation, and those President-Elect nominees have previously served on the Board of Directors or have board and/or committee experience.</li><li>■ Oversee the annual elections.</li><li>■ Forward items of importance for posting to the Communication and Social Media Committee.</li></ul>
		<b><u>Monthly Calendar Activities</u></b> <ul style="list-style-type: none"><li>▪ October – Present budget to Board</li><li>▪ March/April - Solicit nominations from membership</li><li>▪ May – Provide list of nominations to Board. Collect biography and photos of candidates.</li><li>▪ June – Nominee information provided to members for 30 days.</li><li>▪ July – Administer ballot for two weeks.</li><li>▪ Provide results to Secretary and President.</li></ul>

**Standing Committee**

<b>Committee</b>	<b>Purpose</b>	<b>Responsibilities</b>
Training	The Training Committee is responsible for planning, developing and conducting training activities that contribute to the professional advancement of financial aid professionals. This committee is also responsible for identifying and introducing initiatives that will promote diversity within the membership.	<ul style="list-style-type: none"> <li>■ Plan and conduct the annual New Aid Officers Workshop. The New Aid Officers Workshop is often planned in coordination with the national and regional offices of the U.S. Department of Education and the Texas Higher Education Coordinating Board.</li> <li>■ Plan and conduct the annual ABC Workshop held prior to the annual conference.</li> <li>■ Prepare budgets for any training activities under its charge. Budgets should include the following:               <ol style="list-style-type: none"> <li>1) expenditures;</li> <li>2) recommended on-time and late registration fees; and</li> <li>3) expected revenues from registration fees.</li> </ol>               These budgets and fees must be approved by a quorum of the Board.             </li> <li>■ Work to pair new financial aid professionals with industry veterans to develop effective partnerships.</li> <li>■ Update, produce, and distribute the Mentor/Protégé Guide to all TASFAA members. This guide includes strategies for effective mentoring, informational questions to facilitate the relationship and an activity log to encourage data sharing.</li> <li>■ Forward items of importance for posting to the Communication and Social Media Committee.</li> </ul> <p><b>Monthly Calendar Activities</b></p> <ul style="list-style-type: none"> <li>■ October – Present budget to Board, ABC Workshop</li> <li>■ December – Subcommittee assignments, ListServ NAOW “Save the Date Message”, Site representative meetings</li> <li>■ January - Submit NAOW information to Web Services for webpage, and request prior year online registration form from Web Services.</li> <li>■ February – Confirm online registration availability with Web Services.</li> <li>■ March – Finalize meals and meeting room for NAOW.</li> <li>■ April – Finalize trainers and presenters for NAOW.</li> <li>■ May – NAOW</li> <li>■ June – Request prior year ABC online registration form from Web Services.</li> <li>■ July – Submit ABC information to Web Services for website, confirm status of online registration form with Web Services, and begin year-end report.</li> <li>■ September – Finalize ABC trainers, presentation and agenda; construct following year budget recommendations.</li> </ul>

<u>Ad Hoc Committee</u>		
<u>Committee</u>	<u>Purpose</u>	<u>Responsibilities</u>
<p>Awards and Scholarships Committee</p> <p>*The Awards committee was merged with the Scholarship Committee. The committees now share the functions and responsibilities associated with each.</p>	<p>The Awards and Scholarship Committee will facilitate the awarding of TASFAA Service Awards and coordinate and administer the TASFAA Mack C. Adams professional development scholarships.</p> <p>TASFAA Service Awards are comprised of the TASFAA Service pins awarded for years of service, TASFAA Hall of Fame Awards, Trailblazer Award and the Financial Aid Star Award.</p> <p>The Mack C. Adams professional development scholarships are intended to give financial support for financial aid professionals for expenses associated with the cost of a TASFAA workshop.</p>	<ul style="list-style-type: none"> <li>■ Seek applications from the membership for those who desire scholarship assistance to attend NAOW or the TASFAA Fall Conference.</li> <li>■ Select scholarship recipients for the Mack C. Adams Professional Development Scholarships.</li> <li>■ Solicit nominations from the membership for all TASFAA Awards.</li> <li>■ Present nominations and recommendations for all TASFAA Service Awards to the TASFAA Board.</li> <li>■ Provide service pins and appropriate plaques to be presented to the recipients at the annual conference.</li> <li>■ Update the TASFAA website with the names of each scholarship and award recipient.</li> <li>■ Forward items of importance for posting to the Communication and Social Media Committee.</li> <li>■ Review applications and suggest recipients for the ATLE-TASFAA Education Scholarship.</li> </ul> <hr/> <p><b><u>Monthly Calendar Activities</u></b></p> <ul style="list-style-type: none"> <li>■ October – Recognize award recipients for fall conference, ensure service pins are delivered to conference for conference attendees (including President’s pin).</li> <li>■ November – Mail remaining service pins. Notify web services committee of the award recipients so TASFAA website can be updated. Send email welcoming new committee members once placed. Receive budget for the year from the Board.</li> <li>■ January – Inventory and order service pins. Review TASFAA website to see when NAOW is scheduled. Work with web services to make any necessary updates for Mack C. Adams online scholarship application for NAOW.</li> <li>■ February – Once New Aid Officers Workshop (NAOW) registration opens, notify web services to make Mack Adams scholarship available on TASFAA website. Send Listserv email that scholarship application is available.</li> <li>■ March – Listserv email reminder – deadline for Mack C. Adams scholarship application.</li> <li>■ April - Mack C. Adams scholarship - Confirm budget amounts, set up Dropbox and sent to committee to review applications (give 1 wk for review), select and notify recipients, supervisors, Board and Treasurer, NAOW chair and TASFAA bookkeeper. Notify those not selected as well.</li> <li>■ April-Review applications and suggest recipients for the ATLE-TASFAA Education Scholarship.</li> <li>■ May – Listserv notice soliciting nominations for the Hall of Fame Awards and Financial Aid STAR award (June 1st deadline). Request Membership Committee chair notify members to review/update TASFAA information to ensure current information for service pin determination.</li> <li>■ June – Listserv reminder – deadline for nominations for the Hall of Fame Awards and Financial Aid STAR award (June 1st deadline). Review and recommend recipients for the STAR award and the Hall of Fame awards. Make a call for nominations for the Trailblazer award to the TASFAA board (July 1st deadline). Work with web services to make any necessary updates for Mack C. Adams online scholarship application for the ABC Workshop.</li> <li>■ July – Present committee recommendations to Board for new Hall of Fame members and STAR award. Provide list of all nominees and why or why not recommended by the committee. Once approved, notify</li> </ul>

		<p>sponsor of Hall of Fame nominee and see if they would like to present award at conference. Once the ABC Workshop registration opens, notify web services to make Mack Adams scholarship available on TASFAA website. Send Listserv email that scholarship application is available.</p> <ul style="list-style-type: none"> <li>▪ August – Order plaques (and engrave) for fall conference (award recipients and President). Pull current member list from TASFAA website to determine who should get service pins. Mack C. Adams scholarship - Confirm budget amounts, set up Dropbox and sent to committee to review applications (give 1 wk for review), select and notify recipients, supervisors, Board and Treasurer, ABC chair and TASFAA bookkeeper. Notify those not selected as well. Notify SWASFAA Awards Chair of the Trailblazer recipient.</li> <li>▪ September – Request list of members registered for TASFAA from conference chair (after registration deadline) so service pins can be sent to conference for those attending.</li> </ul>
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<u>Ad Hoc Committee</u>		
<u>Committee</u>	<u>Purpose</u>	<u>Responsibilities</u>
<p>Web Services Committee</p> <p>*In 2013, the Communication Network and Association Resources Committee was renamed to Web Services Committee</p>	<p>The Web Services Committee works with ATAC Corporation to provide web-based assistance and information to the TASFAA community.</p>	<ul style="list-style-type: none"> <li>▪ Provide website support and assist Association Committees and members in the navigation, access and posting of information to website.</li> <li>▪ Function as liaison between the Association members and ATAC Corp. representatives</li> <li>▪ Update leadership information.</li> <li>▪ Assist committees and members with online forms, directories and other resources. Update and archive reference materials.</li> <li>▪ Manage the job listings displayed on the TASFAA website.</li> <li>▪ Administration of TASFAA Listserv. (See Appendix E - TASFAA Listserv Policy).</li> <li>▪ Forward items of importance for posting to the Communication and Social Media Committee.</li> <li>▪ Recommended annual ATAC contract review for Board approval.</li> </ul> <p><b>Monthly Calendar Activities</b></p> <ul style="list-style-type: none"> <li>▪ October - Fall Conference (mini-site closed immediately following Conference) - Fall Conference presentation materials posted to Resource page of website - Update Awards for current year - Assist Membership Committee with new year - Request Chair website access and send user guides to new appointees</li> <li>▪ November/December - Update all Leadership information - President's Message</li> <li>▪ January - ATAC: Begin work on NAOW information &amp; forms</li> <li>▪ February - ATAC: Leadership nominations - Nominations Committee</li> <li>▪ March - Website updates from Membership Committee - Contact and supply Fall Conference Committee with mini-site information - NAOW information posted to website</li> <li>▪ April - Leadership ballot - Nominations Committee - ATAC: Begin work on Fall Conference mini-site and forms</li> <li>▪ May - Scholarships Committee updates. Fall Conference mini-site live</li> <li>▪ June - ATAC: Begin work on ABC information &amp; registration form</li> <li>▪ July/August - Annual Report information from Communications and Social Media Committee - ABC Workshop information from Training Committee</li> <li>▪ September - Annual Report</li> </ul>

<u>Ad Hoc Committee</u>		
<u>Committee</u>	<u>Purpose</u>	<u>Responsibilities</u>
Constitution and Bylaws Committee	The Constitution and Bylaws Committee, or TASFAA member appointed by the President, is responsible for reviewing the Constitution and Bylaws as well as the general policies and procedures manual of the association for appropriateness as they govern the activities and needs of the association.	<ul style="list-style-type: none"> <li>■ Attend all Board meetings and review minutes after each meeting to incorporate all required changes per Board actions.</li> <li>■ Review the governing documents for appropriateness and make recommendations for changes to the Board.</li> <li>■ Forward items of importance for posting to the Communication and Social Media Committee.</li> </ul>
		<p><b><u>Monthly Calendar Activities</u></b></p> <ul style="list-style-type: none"> <li>■ October – Present budget to Board. Request Board input and changes.</li> <li>■ November – Review all Constitution, Bylaws, TASFAA Policies and Procedures manual.</li> <li>■ February – Request updated committee goals, etc. for policies and procedures.</li> <li>■ June – Contact committee chairs to update purpose, responsibilities and monthly calendar activities. Send updates to Web Services Committee for posting to TASFAA website.</li> <li>■ July – prepare for annual meeting votes if applicable.</li> </ul>

<u>Ad Hoc Committee</u>		
<u>Committee</u>	<u>Purpose</u>	<u>Responsibilities</u>
<p>Early Awareness Committee</p> <p>*In 2007-08 the High School Partnership Training Committee was merged with the Early Awareness Committee. The Early Awareness Committee is responsible for all functions.</p>	<p>The Early Awareness Committee facilitates a positive, cooperative relationship between the Association and Texas middle schools and high schools providing financial aid information. In order to accomplish its goals the committee will Coordinate annual training in all 20 regions of the state and annually update, produce and distribute comprehensive financial aid materials for training attendees.</p>	<ul style="list-style-type: none"> <li>■ Develop and update a common financial aid presentation for schools.</li> <li>■ Initiate contacts with other professional associations to provide financial aid programs for parents and counselors in Texas.</li> <li>■ Post completed presentations to the TASFAA website for use by members conducting early awareness activities.</li> <li>■ Provide financial aid training opportunities for Texas public and private high school counselors and other community partners.</li> <li>■ Forward items of importance for posting to the Communication and Social Media Committee.</li> </ul>
		<p><b><u>Monthly Calendar Activities</u></b></p> <ul style="list-style-type: none"> <li>▪ October – Present budget to Board</li> </ul>

<u>Ad Hoc Committee</u>		
<u>Committee</u>	<u>Purpose</u>	<u>Responsibilities</u>
Communications and Social Media Committee  *In 2013, the Newsletter Committee was renamed Communications and Social Media Committee	The Communications and Social Media Committee is responsible for publishing the TASFAA Annual Report.	<ul style="list-style-type: none"> <li>■ Post at least one article, training information, link, story, or tip to the Association’s social media page per week.</li> <li>■ Produce the Annual Report at the end of each TASFAA fiscal year.</li> <li>■ Other items to be posted include: training and professional development opportunities; Dear Colleague Letters; Chronicle of Higher Education articles; TASFAA event promotion; and information about TASFAA’s history, mission and vision.</li> <li>■ Administration of TASFAA Social media sites.</li> </ul> <p>The TASFAA Annual Report is a publication that should summarize the activities and work of the association and made available after the conclusion of the year being reported on.</p>
		<p><b><u>Monthly Calendar Activities</u></b></p> <ul style="list-style-type: none"> <li>■ October – Present budget to Board. Post annual report to TASFAA website.</li> <li>■ Monitor social media on a monthly basis.</li> </ul>

<u>Ad Hoc Committee</u>		
<u>Committee</u>	<u>Purpose</u>	<u>Responsibilities</u>
Regional Training Committee	The Regional Training Committee provides free Professional development training to Financial Aid Administrators across the state of Texas in collaboration with TG and THECB known as the Texas Regional Training.	<ul style="list-style-type: none"> <li>▪ Develop a consistent free training each year for 5-7 site locations in Texas as needed and approved by the Board. Topics will be generated based on current regulatory and/or professional development needs and may incorporate NASFAA Fall Regional Training.</li> <li>▪ Coordinate and collaborate with TG, and THECB for all logistical planning &amp; set-up needed for training; required attended conference calls (as needed)</li> <li>▪ Provide a team of trainers for each locale, and designate outline for TASFAA presentation(s)</li> <li>▪ Create presentations, and any hands-on activity (if applicable), and all material/handouts for participants to print</li> <li>▪ Create Questions for each TASFAA presentation topic for the Show What You Know (SWYK) quiz</li> <li>▪ TASFAA will split food cost with TG provide TG the Treasurer information</li> <li>▪ Include all three agency logos on all material wherever Texas Regional Training is announced and/or displayed.</li> <li>▪ Forward items of importance for posting to the Communication and Social Media Committee.</li> </ul>
		<p><b><u>Monthly Calendar Activities</u></b></p> <ul style="list-style-type: none"> <li>▪ October – Present budget to Board. Identify and train trainers; determine schedule, Finalize dates/locations present tentative agenda. Begin booking Airfare and Hotel reservations.</li> <li>▪ November – Finalize training agenda, dates/locations. Request prior year registration form from Web Services for review/changes. Send Training Announcements to TASFAA list serve and agenda/dates to TASFAA communication specialist to post on TASFAA training calendar. Send all presentations &amp; material to TG to secure on jump drive also include any handouts/material for participants to print.</li> <li>▪ Dec –March: Receive online registration activity from TG, Send training announcements to TASFAA list serve. Complete all Training on scheduled dates &amp; sites, attend final run thru and recap conference calls prior and post site trainings. Receive copy of evaluations &amp; sign in sheets.</li> <li>▪ April/May – Submit expense reimbursements to Treasurer Prepare End of the Year Report for Board.</li> <li>▪ June- Set up FY14 meet with TASFAA Regional Training Committee member(s) to go through ideas/ evaluation suggested topics, survey FAA community for desired topics, research hot topics.</li> <li>▪ July – Final report to Board includes topics and any changes/ request necessary for upcoming training.</li> <li>▪ August/September- Secure host sites, receive NASFAA Fall Regional Training material and determine if relevant to use Compose/create new training presentations/hands- on activities (if applicable).</li> </ul>

<u>Ad Hoc Committee</u>		
<u>Committee</u>	<u>Purpose</u>	<u>Responsibilities</u>
Site Selection Committee	The Site Selection Committee evaluates and recommends locations and hotels for future annual conferences and New Aid Officers Workshops.	<ul style="list-style-type: none"> <li>■ Visit viable sites and evaluate them for future events. The committee is to ensure that sufficient space is available for meeting, exhibit, dining and sleeping and ensure the any site considered has reasonable accessibility by major airlines.</li> <li>■ Provide to the Board a site report with a recommendation and tentative contract for a future site.</li> <li>■ Work to secure final contracts for the President’s signature.</li> <li>■ Forward items of importance for posting to the Communication and Social Media Committee.</li> </ul>
		<p><b><u>Monthly Calendar Activities</u></b></p> <ul style="list-style-type: none"> <li>▪ October – Present budget to Board</li> <li>▪ February – Recommendations to Board (2yr. advance)</li> <li>▪ March – Visit Fall conference site (1 yr. advance). Possible site for NAOW.</li> <li>▪ May – Three year proposal NAOW/Training. Finalize site for conference (2y. advance)</li> </ul>

<u>Ad Hoc Committee</u>		
<u>Committee</u>	<u>Purpose</u>	<u>Responsibilities</u>
<p>Legislative Issues Committee</p> <p>*In 2007-08, the Legislative Issues Committee was dissolved and its duties absorbed into the function of the Board of Directors.</p> <p>**In 2009-10, the Legislative Issues Committee was reinstated and became an active Committee of TASFAA.</p>	<p>The Legislative Issues Committee will work with the Congress, Department of Education, Texas Legislature, Texas Higher Education Coordinating Board, and other entities to communicate the opinions of the Association on any legislation or other issues that may affect the Association or profession. This committee will report to the Board, as well as its members, on matters regarding any relevant laws, regulations or proposed legislation.</p>	<ul style="list-style-type: none"> <li>■ Monitor financial aid legislative actions during the Texas Legislative session.</li> <li>■ Together with members of the Board, keep in close contact with Texas' 34 member congressional delegation briefing them and their staff on Texas' priority issues with respect to HEOA reauthorization as necessary.</li> <li>■ Provide updates to the Board on any matters regarding laws, regulations or proposed legislation related to financial aid.</li> <li>■ Forward items of importance for posting to the Communication and Social Media Committee.</li> </ul>
		<p><b><u>Monthly Calendar Activities</u></b></p> <ul style="list-style-type: none"> <li>■ October – Present budget to Board</li> </ul>

<u>Ad Hoc Committee</u>		
<u>Committee</u>	<u>Purpose</u>	<u>Responsibilities</u>
SWASFAA Relations Committee	The elected Texas Delegate at Large on the SWASFAA Board of Directors represents TASFAA at SWASFAA regional and state meetings.	<ul style="list-style-type: none"> <li>■ Report SWASFAA activities to the TASFAA Board and provide pertinent current event articles for the newsletters of both organizations.</li> <li>■ Forward items of importance for posting to the Communication and Social Media Committee.</li> </ul>
		<p><b><u>Monthly Calendar Activities</u></b></p> <ul style="list-style-type: none"> <li>▪ October – Present budget to Board</li> <li>▪ Quarterly meetings.</li> </ul>

Archived Committees		
<p>Association Activities and Resource Committee</p> <p>*Effective 2010-11, the TRAINetwork no longer active.</p> <p>**In 2007-08 this committee was merged with the Communication Network and Association Resources Committee. These functions are now the responsibility of that committee.</p>	<p>The Association Activities and Resources Committee identifies and acknowledges the various outreach and early awareness efforts accomplished by the Associations' members and associates.</p>	<ul style="list-style-type: none"> <li>■ Maintain the Web-based tracking system entitled TASFAA Resources Activities Instructional Network (TRAINetwork) which lists all grade school events, high school nights, financial aid awareness events, parent nights, and other activities. The system allows all member institutions to view these activities by state territory, county, and zip code and provides a brief description of the events' purpose, audience, attendance, and participant feedback.</li> <li>■ Encourage TASFAA membership to document outreach activities.</li> <li>■ Provide information to the community and governmental entities in order to educate them about the associations' commitment to outreach and public awareness of student financial aid.</li> <li>■ Encourage the association membership to make use of and promote the TASFA TRAINetwork.</li> </ul>
<p>Mentoring, Leadership &amp; Diversity Initiatives Committee</p> <p>In 2007-08 this committee was merged into the Membership Committee and its functions became the responsibility of that committee.</p> <p>In 2009-10, this committee was reinstated and became an active Committee of TASFAA.</p> <p>In 2011-12, this committee was merged into the Training Committee and its functions became the responsibility of that committee.</p>	<p>The Mentoring, Leadership &amp; Diversity Initiatives Committee's primary objective is to identify and introduce initiatives that will promote diversity within the membership.</p>	<ul style="list-style-type: none"> <li>■ Work to pair new financial aid professionals with industry veterans to develop effective partnerships.</li> <li>■ Update, produce, and distribute the Mentor/Protégé Guide to all TASFAA members. This guide includes strategies for effective mentoring, informational questions to facilitate the relationship and an activity log to encourage data sharing.</li> </ul>
<p>President's Advisory Council</p> <p>*This council does not function. Dissolved.</p>	<p>The President's Advisory Council is responsible for completing tasks as assigned by the current President.</p> <p>The President's Advisory Council is</p>	<ul style="list-style-type: none"> <li>■ Make recommendations for improving the ability of the Association to effectively meet its goals.</li> <li>■ Coordinate TASFAA Past Presidents into an effective advisory group for the President and Board.</li> <li>■ Evaluate the needs of the Association as requested by the Board.</li> <li>■ Review the existing Strategic Plan document for recommendations to the Board for approval.</li> <li>■ Communicate regularly with Committee Chairs to remind them of their charge to TASFAA's goals.</li> </ul>

	responsible for evaluating the TASFAA Strategic Initiative and Goals for the Association with regard to meeting the objectives of the Association.	
Public Relations Committee  *In 2007-08 this committee was merged with the Newsletter Committee and its functions became the responsibility of that committee.	The Public Relations Committee helps promote a positive image of the Association to educational institutions, other professional associations, foundations, government agencies, students, parents, and the general public.	<ul style="list-style-type: none"> <li>■ Develop, coordinate, and conduct strategic activities to promote financial aid awareness.</li> <li>■ Assist other TASFAA committees in promoting their respective programs.</li> <li>■ Ensure TASFAA banner is displayed at various Association events and conferences.</li> <li>■ Host a booth at the TASFAA conference and actively seek new volunteers while publicizing the work done by others throughout the association.</li> <li>■ Coordinate the publishing and distribution of the Association's Annual Report. Copies are to be presented to attendees of the New Aid Officer Workshop, training sessions of the Texas Legislature, and mailed to the presidents and chancellors of colleges and universities in Texas.</li> <li>■ Solicit and assist in the submission of applications for the NASFAA State Award competition.</li> </ul>
Decentralized Training Committee  *In 2007-08 this committee was merged with the Regional Training Committee and its functions became the responsibility of that committee.	The Fall Decentralized Training is responsible for presenting the NASFAA Fall Training Workshop materials throughout the state of Texas.	<ul style="list-style-type: none"> <li>■ Ensure all committee members selected possess good training skills, be able to learn the training materials, and be available to present two to three workshops around the state.</li> <li>■ Ensure committee members attend the Training of the Trainers for NASFAA's Fall Workshop series.</li> <li>■ Coordinate with SWASFAA to present one session in Texas in partnership with SWASFAA. Coordinate and conduct workshops throughout the state.</li> </ul>
Associate Member Relations Committee  *In 2007-08 this committee was dissolved and its functions assigned to the Fall Conference Committee.	This Associate Member Relations Committee will coordinate all exhibitor activity and facilitate a positive relationship between the Association and its Associate Members.	<ul style="list-style-type: none"> <li>■ Develop material and information for potential exhibitors.</li> <li>■ Encourage informational exhibits at TASFAA events.</li> <li>■ Arrange for exhibitor needs and effective use of exhibitor space.</li> <li>■ Recognize publicly the contributions of all exhibitors and send thank you letters to exhibitors for their participation in the event.</li> <li>■ Review and recommend exhibition booth rates as well as any discounts offered for different levels of exhibits.</li> <li>■ Review the policies affecting exhibitor space and make recommendations to the Board when appropriate.</li> <li>■ Contract with a drayage company and design an exhibitor floor plan for the annual conference.</li> <li>■ Provide input to the site selection committee concerning exhibitor needs.</li> </ul>

## 7.5 Appendix E – Communications & Social Media Policy

TASF AA welcomes constructive, civil debate and professional exchanges. Users are responsible for their online posts and activities; however, if a user works for a school, they must familiarize themselves with their institutional policy. Violating some of the items below could result in disciplinary action or discharge at work. Users of the TASF AA social media are legally responsible for their commentary. If legal issues arise with a user's commentary or posts, TASF AA has no obligation to represent the user regarding legal issues. If TASF AA social media Administrators, and/or its current Board Members have any concerns regarding the content of a user's commentary or posts, TASF AA reserves the right to remove any commentary or block the offending u

- When posting comments on social media pages, the user acknowledges that they are speaking on their own behalf, rather than on behalf of TASF AA.
- Be respectful in all circumstances. Users should not criticize or respond to criticism with hostility. Be aware that personal attacks against another person's professional competence or character might amount to defamation and result in a lawsuit against the user personally.
- Don't post comments that are off-topic or needlessly inflammatory, seek to provoke an emotional reaction from others, attempt to disrupt and derail the discussion, or abuse evidence and reasoning to defend an unjustifiable conclusion.
- Don't use rude or insulting language. Posting sexually harassing, vulgar, lewd or obscene remarks or material is strictly prohibited and might result in a lawsuit against you personally, or disciplinary action if it affects your working relationships.
- Insulting or threatening others based on race, ethnicity, marital status, political beliefs or party, gender, religion, disability, sexual orientation, gender identity, military service or other personal qualities is strictly prohibited.
- If a user is a school employee, do not discuss any student by name. Moreover, do not discuss any student's educational record or confidential information. Users are individually responsible for not violating privacy laws.
- If a user is a school employee, do not discuss personal or work-related grievances. Also, don't critique your co-workers, administrators or Institutional Executive members.
- Please respect copyrighted material, including web pages. If it's not yours, cite it, and link to it if possible.
- Don't spread rumors. If the user cannot personally verify that something is factual, it should not be posted. Similarly, if something is confidential, please do not discuss it in a public forum such as Social media.

### **BLOG POLICY:**

The TASF AA Blog, *TASF AA Star*, is intended to be written primarily by and for TASF AA members. It is to be used as a communication tool to keep the financial aid, TASF AA, SWASF AA, NASF AA community informed with information and/or opinions, related events and current topics in financial aid. The administration of the blog will be handled by the TASF AA Communications and Social Media Committee.

- All posts should be related to the administration of financial aid or TASF AA, SWASF AA or NASF AA activities.
- Blog entries are not to be used for business purposes other than TASF AA. For profit, nonprofit, and government entities are not permitted to use the blog as a vehicle for advertising their products or services. This includes products and services for which there is no cost. Service and operational announcements by these entities can be made if they are open to all members of TASF AA and do not promote the entity or its products. Any exceptions to this policy must first be approved by the TASF AA Board.
- The Board of Directors and Committee Chairs may use the blog as a vehicle for promoting TASF AA related events and initiatives. TASF AA members may also submit blog entries that are related to the administration of financial aid and events related to the financial aid community.
- The TASF AA Communications and Social Media Chair must approve all submitted blog posts before they are published. If the appropriateness of the content in the entry is questionable, the Communications and Social Media Chair may seek approval from the Communications and Social Media Committee or the TASF AA Board of Directors before approving a blog post.

TASFAA listserv (TasfaaL) subscribers are asked to adhere to the following policies:

- a. Messages should be related to the administration of Financial Aid. Messages to TasfaaL are to be kept “on topic”.
- b. TasfaaL is intended for official TASFAA business and information sharing among colleagues. Advertising is limited to TASFAA sponsored activities (except as in (f) below). For-profit, non-profit, and government entities are not permitted to use TasfaaL as a vehicle for advertising their products or services. This includes products and services for which there is no cost. Professional development workshops, service and operational announcements by these entities can be made if they are open to all members of TASFAA. Exceptions to this policy can only be approved by the TASFAA Board.
- c. “Job Wanted” postings are not permitted.
- d. “Position Available” postings are permitted. The emphasis should be on the open position not the institution or company. A TasfaaL notice is automatically generated when a position is posted and approved to the employment section of the TASFAA website.
- e. Virus messages, email scams, and the like are not permitted. In general, our individual organizations should have policies in place to deal with these threats (virus software, for example). TasfaaL doesn’t need to be the vehicle for those types of announcements. NOTE: If your information regarding a threat has specific and direct bearing on the financial aid community, please contact [support@tasfaa.org](mailto:support@tasfaa.org) for clearance.
- f. Postings in excess of 200 lines are rejected. Shorten the message, or provide a URL in the body of the message to point to other relevant information.
- g. “Plain text” attachments are encouraged for the convenience of the readers.
- h. TEST messages are not permitted. If you have difficulty posting or are in need of further assistance, please contact [support@tasfaa.org](mailto:support@tasfaa.org).
- i. Bounced messages. Subscriptions for individuals whose email bounces for five days will be suspended. Since bouncing email is evidence of a problem somewhere, the only awareness you may have of the situation may be the absence of TasfaaL postings in your mailbox. Contact [support@tasfaa.org](mailto:support@tasfaa.org) if you feel you have been suspended.

**TASFAA Strategic Planning**

**TASFAA President:**

**Year:** 20xx-20xx

**Mission (Purpose):** The Association is organized for education and research purposes of its membership and shall not be operated for profit.

**Vision:** The Texas Association of Student Financial Aid Administrators will serve as an exemplar for promoting student access and success in higher education while also providing excellent professional development opportunities for its members.

**Instructions:** Each TASFAA President is to complete throughout their term and as Past President, present at the December Board Meeting. The President-Elect will complete objectives for presentation to the Board at the July Board Meeting. The document will also serve as a guide for the President – E l e c t and be archived in the TASFAA Time Capsule. Goals are to remain static while the objective, assessment and notes are to be completed.

**Strategic Directions and Initiatives:**

<b>Goal 1: Encouraging students to pursue higher education.</b>	
<b>Objective:</b>	Example: Encourage member participation in various outreach opportunities such as telethons, College Goal Live Sunday, etc.
<b>Assessment:</b>	Example: Bullets from President’s reports that could be used as assessment point for each goal.
<b>Goal Met/Notes:</b>	

**Goal 2: Promoting student financial aid programs in the post-secondary institutions of the state.**

<b>Objective:</b>	Example: Promote a positive, cooperative relationship between the Association and Texas middle schools and high schools providing financial aid information. Initiate contacts with other professional associations to provide financial aid programs for parents and counselors in Texas.
<b>Assessment:</b>	
<b>Goal Met/Notes:</b>	

**Goal 3: Facilitating communication, activities, services, and professional development among constituencies involved in student financial aid administration in the state.**

<b>Objective:</b>	Example: Conduct annual NAOW and ABC to provide professional development opportunities for financial aid administrators. Partner with THECB and TGSLC to conduct regional training. Provide training materials and resources for state-side high school training workshops.
<b>Assessment:</b>	
<b>Goal Met/Notes:</b>	

<b>Goal 4: Inspiring professional competencies in the field of student financial aid administration.</b>	
<b>Objective:</b>	Example: Encourage professional development opportunities in the areas of leadership. Encourage membership involvement with the Association by offering professional development scholarships.
<b>Assessment:</b>	
<b>Goal Met/Notes:</b>	

<b>Goal 5: Motivating innovation and creativity in the financial aid field to span all cohorts.</b>	
<b>Objective:</b>	Example: Encourage membership participation and involvement in regional and national associations. Encourage membership communication through committees.
<b>Assessment:</b>	
<b>Goal Met/Notes:</b>	

<b>TASFAA President Comments</b>	
<b>Objective:</b>	To provide a record of Presidential initiatives beyond the scope of the official goals of TASFAA.
<b>Assessment:</b>	

**Section 8 CONSTITUTION AND BYLAWS AMENDMENT LOG**

Please contact the TASFAA Constitution and Bylaws Committee Chair for archived TASFAA Constitution and Bylaws Amendment Log.

**Section 9 TASFAA POSITION PAPERS**

Please refer to the TASFAA Website for TASFAA Position Papers.

## Section 10 BLOG ADMINISTRATOR USER GUIDE

Your blog can be a great source of information and communication for your association members. Please remember that copyright and fair use laws apply to all publications, including blogs. Make sure your content is original or that you have written permission to use someone else's material. Take time to read the Terms and Conditions posted at the bottom of your blog page. This important document is in place to protect your association and to provide guidance for usage of the blog.

1. Go to [www.tasfaa.org/b/](http://www.tasfaa.org/b/) and "Register" for an account. The "Register" link is located in the top right column under "Join Us." After registering, you will receive an email with your username and password to use when logging in. Login and change your password to one of your own choice.
2. After you have registered and updated your password, send an email to [BlogAdmin@tasfaa.org](mailto:BlogAdmin@tasfaa.org) to request that your status be updated to "Editor." (All registrants are automatically set as "Subscribers" which will allow them only to comment on articles.)
3. Once you are confirmed as an "Editor," you can refresh your page to obtain your new options. Mouse over the Blog Title in the upper left corner. Select the "Dashboard". This is your administrative area.
4. If you have other people that you would like to set as a "Contributor", let us know. Contributors can initiate Posts and manage Comments.

### USING THE DASHBOARD:

The following options are available under the "Dashboard":



- a. The first page of the "Dashboard" is a general information page with an up-to-date status of your blog (comments, posts, etc.).
- b. "Counterize" will give you detailed information of the traffic and use of your blog site.
- c. "Posts" –
  - i. A "Welcome" post has been set up for your blog. This gives general information and should remain on the site. It is set as a "sticky" post, which means it will always remain at the top of your blog page.
  - ii. The "Posts" link will allow you to view/manage "All Posts" - In the "All Posts" option, **mouse over a post title and you will have the option to Edit, Quick Edit, Trash or Review the post.**
  - iii. "Add a New Post"
    - Add title for New Post
    - Put in text for post – standard editing button options are available.
    - On the right, under "Publish" you can Save Draft, Preview or Publish directly.

In general, leave the Format at Standard.

The screenshot shows the WordPress 'Add New Post' interface. At the top, there is a title field with the placeholder text 'Enter title here'. Below the title field is a rich text editor with a toolbar containing various icons for text formatting, alignment, and media insertion. To the right of the editor, there is a 'Publish' button and a 'Save Draft' button. Below these buttons, the status is shown as 'Draft'. A callout box points to the 'Add Media' icon in the toolbar, stating: 'Click here to insert a photo/graphic. Make sure to pick your alignment on the next screen.' Below the editor, there is a 'Format' section with radio buttons for 'Standard', 'Aside', 'Link', 'Gallery', 'Status', 'Quote', and 'Image'. A callout box points to the 'Standard' option, stating: 'If you don't want an email sent to the subscribers, click here.' Below the 'Format' section, there is a 'Categories' section with a list of categories: 'Association News', 'Federal Issues', 'General', 'People in the News', and 'State Issues'. A callout box points to the 'Categories' section, stating: 'Select a category for your post. You can also add a new category if needed.' At the bottom of the interface, there is a 'Subscribe2 Notification Override' section with a checkbox and a link to 'Check here to disable sending of an email notification for this post/page'.

“Categories” are broad groupings that provide a helpful way to group related posts together, and to quickly tell readers what a post is about. Categories also make it easier for people to find your content. Categories are similar to, but broader than “Tags.”

“Tags” provide a useful way to group related posts together and to quickly tell readers what a post is about. Tags also make it easier for people to find your content. Tags are similar to, but more specific than Categories. *The use of tags is completely optional.*

Example – Federal Issues is a Category. Pell Grants or Reauthorization would be Tags.

## **MEDIA**

This shows your media library. There is a header graphic already in your library. These are needed for your blog header/login and should NOT be removed. You can add new Media. The maximum file size is 4 MB, but for quick loading, smaller sizes are recommended.

## **LINKS**

The “Links” section can be used for setting up a “Blogroll” - a list of links to other blogs that your readers might be interested in. The “Blogroll” listing would appear on the blog pages in the right hand column. Currently this feature is inactive. If you decide to add Blogroll links, please contact [BlogAdmin@tasfaa.org](mailto:BlogAdmin@tasfaa.org) to have this activated.

## **PAGES**

An “About the Blog” page is already available on your site. It contains important information for new users and subscribers. A “You are Subscribed” page is also in place. **These pages should not be deleted or modified.**

Pages should only be added for specific things – in general the posts will be how the site is updated. You do not want to add a lot of pages.

## **COMMENTS**

As Editor, you’ll receive an email when a comment is made. The first time a registered user posts, you’ll need to approve their comment. Once a user has had one comment approved, they may comment in the future without moderation. You always have the option to unapprove, reply, edit, spam or trash a comment, by mousing over the comment itself.

## **PROFILE**

Use this section to change your password and provide as much, or little, information that you would like included about yourself.

## **SUBSCRIBE2**

All users have the option in this section to decide what type of email they would like to receive and what types of posts they are interested in.

## **POLLS**

As Editor, you can Add or Manage Polls on the Blog. An initial Poll has been created to gather information on what topics users are interested in. The polls will generally appear at the bottom of the page. You can “Insert a Poll” into a post by clicking the “Insert Poll” icon  in the “Add New Post” section. You must have first created the poll and know the poll ID, which is available in the “Manage Polls” section.

To “Add a Poll”, create your question and list the possible answers. Polls should be short, concise and direct. You can list a start and ending date for your poll.

