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	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER General 1 AREA General DATE APPROVED 07/14/84 DATE REVISED 02/27/97
	Policies & Procedures	
	Subject: Code of Practices	

1. The purpose of any student financial aid program--institutional, governmental or private--should be to provide monetary resources to students who seek further education but cannot secure it without financial assistance.
2. Financial aid consists of scholarships, grants, loans, and employment, either singularly or in combination, awarded on the basis of the applicant's documented financial eligibility.
3. Each post-secondary institution has an obligation to assist in realizing the national goal of equality of educational opportunity. Each institution should work with secondary schools, community groups, and other educational institutions in support of the goal to make it possible for the student to choose a college on educational rather than financial grounds.
4. Admissions decisions should be made without regard to the financial need of the applicant. Each financial aid administrator should make maximum effort toward the attainment of the goal of equality of educational opportunity; however, the institution should not use need-based financial aid as a recruitment device.
5. The institution should publish budgets that state the total yearly cost of attendance and that outline for each student seeking assistance an accurate estimate of his or her eligibility for financial assistance.
6. The principal responsibility for financing a postsecondary education belongs to the student and his/her family. Parents of dependent students are expected to contribute according to their means, taking into account their income, assets, number of dependents, and other relevant information. Students are expected to contribute from their own assets and earnings, including appropriate borrowing from future earnings and application for all public funds for which they might be eligible. The amount and type of self-help expected from students should be related to the individual circumstances.


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7. In awarding assistance, financial eligibility should be given primary emphasis. Academic achievement, special talent, and future promise may be considered, secondarily.
8. An applicant for financial aid shall not be required to give any institutional notice of his or her acceptance of a financial aid offer until three weeks after award notification. Applicants not offered financial aid should be provided with the specific reasons for denial and sent information on potential sources of aid.
9. A statement of financial aid renewal policies should be included with the initial award. Applications should be reviewed annually and adjusted to reflect changes in the financial eligibility of the student. Withdrawal of financial assistance is not suitable discipline; efforts to use financial aid in this manner should be actively resisted by financial aid administrators.
10. All financial aid of an institution should be administered in such a way as to make the most efficient use of available funds.
11. Public and institutional knowledge of financial aid functions should be encouraged through professional relationships between the financial aid staff and the public it serves. Professional research and advocacy are part of this responsibility.
12. A standing committee consisting of administrative officials, faculty, students and a representative of the financial aid office should function at each institution to establish the overall financial aid policies. It may also serve as a Board for students who wish to appeal financial aid decisions. Policies and procedures to protect students' rights should be developed and clearly stated.
13. The procedure for applying for financial aid should be as simple and concise as possible.


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	Policies & Procedures	
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14. Policies and procedures for eligibility determination should be applied consistently to all students of similar types to ensure fairness and equity among all students in a given institution.

15. All records and conversations between an aid applicant, the applicant's family, and financial aid administrators are confidential and entitled to the protection ordinarily given a counseling relationship. Care should be exercised that no public announcement be made of award amounts. Financial aid should be administered in such a manner that other interests, important though they may be, are subordinate to the needs of students.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER General 1 AREA General DATE APPROVED 11/05/2006 DATE REVISED
	Policies & Procedures	
	Subject: Statement of Ethical Behavior	


All SCASFAA members are expected to maintain the highest level of ethical behavior and to refrain from any perception of conflict of interest. All SCASFAA members and other parties affiliated with SCASFAA are required to maintain the highest level of professionalism and reflect a commitment to the financial aid profession, to the goals of the South Carolina Association of Financial Aid Administrators, and to the students we serve. This SCASFAA Association Executive Board reserves the right to refuse or cancel any membership and/or refuse vendor or exhibitor support if Board Members deem that this high level of professionalism and commitment is not maintained.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER General 2 AREA General DATE APPROVED 07/14/84 DATE REVISED 02/27/97
	Policies & Procedures	
	Subject: Retention of Records	

1. It is the policy of the South Carolina Association of Student Financial Aid Administrators that all records and materials relevant to the Association's business are maintained in permanent archives, the site of which shall be designated by the Executive Board. The current designated site of the Association Archives is the South Carolina Student Loan Corporation in Columbia.


In order to facilitate the efficient maintenance and transfer of records within the Association, the following procedures have been established.

2.
 - A. Each officer and committee chairperson shall maintain such records and materials as necessary in carrying out their appropriate responsibilities.
 - B. Upon completion of their term in office, each retiring officer and committee chairperson shall forward one set of all appropriate records and materials to the incoming officer or chairperson and one set to the Secretary of the Association for addition to the Association Archives.
 - C. The Secretary of the Association shall collect copies of all necessary records and materials from each officer and committee chairperson. He/She shall review such documents and add them to the Association Archives as appropriate.


	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER General 3 AREA General DATE APPROVED 07/07/87 DATE REVISED 04/20/08
	Policies & Procedures	
	Subject: Permanent Address	

1. In accordance with Executive Board action on April 20, 2008, the permanent address of the South Carolina Association of Student Financial Aid Administrators will be:

c/o USC-Regional Campuses
1600 Hampton Street Annex, Suite 205
Columbia, SC 29208


	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 100.1 AREA Executive Board
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Voting Members	DATE REVISED 06/18/92

1. Voting members of the SCASFAA Executive Board shall consist of the elected officers and Past President of the Association.
2. All voting members of the Executive Board must be members in good standing of the South Carolina Association of Student Financial Aid Administrators, Inc.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 100.2 AREA Executive Board
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Awards and Recognition	DATE REVISED 10/07/07

The Association shall recognize and honor those individuals who have made significant contributions to the Association, to the cause of student financial aid, or to higher education. Such recognition and honor shall be conveyed as appropriate through one of the established Association awards as identified in this policy and procedure.


1. Fearless Nine Service to SCASFAA Award
 - A. The Executive Board shall be charged to consider nominees for the Fearless Nine Service to SCASFAA Award. Nominations may be made in writing by any current member of SCASFAA and must be submitted annually by January 15 to the President of the Association.
 - B. Individuals nominated for the Fearless Nine Service to SCASFAA Award shall be practicing student financial aid professionals who are current members of the South Carolina Association of Student Financial Aid Administrators and who have made outstanding, significant, and meritorious contributions to SCASFAA through their leadership, activities, and/or research in financial aid over an extended period of professional involvement, not a single event or activity. Current Elected Officers of the Association cannot be nominated for this award.
 - C. One award per year may be approved by a two-thirds (2/3) vote of the Association's Elected Officers. Any Executive Board member nominated for this award will be excused from being present during the vote.
 - D. The recipient shall be presented an appropriate plaque at an official meeting of the Association.
 - E. The following have been recognized as Fearless Nine Service to SCASFAA Awardees:
2008: Marvin Carmichael

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 100.2 AREA Executive Board
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Awards and Recognition	DATE REVISED 4/03/09

- F. A plaque inscribed with the following verbiage shall be utilized for the Fearless Nine Service to SCASFAA Award:

Fearless Nine Service to SCASFAA Award
Presented to
Name of Recipient
in Recognition of Outstanding, Significant,
and Meritorious Contributions to the
South Carolina Association of
Student Financial Aid Administrators
Date

2. SCASFAA Emerging Leader Award
- A. The Executive Board shall be charged to consider nominees for the SCASFAA Emerging Leader Award. Nominations may be made in writing by any current member of SCASFAA and must be submitted annually by January 15 to the President of the Association.
- B. Individuals nominated for the SCASFAA Emerging Leader Award shall be practicing student financial aid professionals who are current members of the South Carolina Association of Student Financial Aid Administrators and who have made outstanding contributions to SCASFAA through their leadership and/or involvement in the Association and who have been members of SCASFAA for not more than seven years. Currently elected officers of the Association can be nominated for this award.
- C. One award per year may be approved by a two-thirds (2/3) vote of the Association's Elected Officers. Elected Officers or Executive Board members nominated for this award will be excused from being present during the vote.
- D. The recipient shall be presented an appropriate plaque at an official meeting of the Association.


	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 100.2 AREA Executive Board
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Awards and Recognition	DATE REVISED 10/07/07

- E. The following have been recognized as SCASFAA Emerging Leader Awardees:
2008: Missy Lutz
- F. A plaque inscribed with the following verbiage shall be utilized for the SCASFAA Emerging Leader Award:

SCASFAA Emerging Leader Award
Presented to
Name of Recipient
in Recognition of Outstanding Contributions
as a new member of the South Carolina Association
of Student Financial Aid Administrators
Date

3. Distinguished Service Award

- A. The Executive Board shall be charged to consider nominees for the Distinguished Service Award.
- B. Individuals nominated for the Distinguished Service Award shall have made outstanding, significant, and meritorious contributions to the advancement of student financial aid. They shall not be current members of SCASFAA.
- C. The nominee must be approved by a two-thirds (2/3) vote of the Executive Board.
- D. The recipient shall be presented an appropriate plaque at an official meeting of the Association.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 100.2 AREA Executive Board
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Awards and Recognition	DATE REVISED 10/07/07

E. The following have been recognized as Distinguished Service Awardees:


Mr. H. Rembert Dennis	1983
Mr. Ed Sexhauer	1984
Mr. Richard W. Riley	1985
Ms. Francine Reeves	1992
Mr. Sterling Smith	1997
Dr. Dallas Martin, Jr.	1998
Mr. William H. Boan	1999
Mr. Nikki Setzler	1999
Mr. Kenneth Player	2003
Mr. David Bartnicki	2003
Mr. Bill Mackie	2005

F. A plaque inscribed with the following verbiage shall be utilized for the Distinguished Service Award:

Distinguished Service Award
Presented to
Name of Recipient
in Recognition of Significant Contributions
to Higher Education and Student
Financial Assistance Programs
South Carolina Association of Student Financial
Aid Administrators
Date

1. SCASFAA Quarter Century Member

- a. The Member-at-Large shall be charged to review Association membership records annually to determine whether any member of the Association warrants recognition as a SCASFAA Quarter Century Member.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 100.2 AREA Executive Board
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Awards and Recognition	DATE REVISED 10/07/07

- b. Current members of the South Carolina Association of Student Financial Aid Administrators who have been members of the Association for 25 years or more shall be presented a SCASFAA lapel pin designating them as a SCASFAA Quarter Century Member.
- c. SCASFAA Quarter Century Member lapel pins shall be awarded by the SCASFAA President at an official meeting of the Association.

2008: Recipients are as follows:

Jacqueline Bell
 Jennifer Bomar
 Marvin Carmichael
 Jacqui Miller
 Geneva Drakeford
 Michael Fox
 Judi Gillespie
 Sallie Glover
 Ellen Green
 Donald Griggs
 Donna Hawkins
 Cheryl Hughes
 Linda Leedy
 Gerald Long
 Sheryll Marshall
 Susan McCrackin
 Eugenia Miles
 Janice Noffz
 Susan Purvis
 Janie Reid
 Gary Rose
 Edward Shannon, III
 Glenn Shumpert
 Judy Smith
 Bill Whitlock

5. Certificate of Appreciation


- A. The President may present the Association Certificate of Appreciation to those individuals deserving of such recognition.
- B. Individuals receiving this award shall have made significant contributions to the Association or to the cause of student financial assistance.
- C. The certificate shall read:

South Carolina Association of
Student Financial Aid Administrators

In Recognition of Noteworthy
Contribution this
CERTIFICATE OF APPRECIATION
is presented to
(Name of Recipient)
Given this _____ day of _____
at _____

In testament thereto,


President's Signature

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 100.2 AREA Executive Board
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Awards and Recognition	DATE REVISED 10/07/07


6. Recognition of Officers

- A. The elected officers shall be recognized for their service to the Association at the Annual Meeting. This recognition will be at the discretion of the President.

- B. Each officer shall be presented with an appropriate plaque denoting the office and year served.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 100.3 AREA Executive Board
	Policies & Procedures	DATE APPROVED 02/23/89
	Subject: Voting Members' Rights	DATE REVISED 06/18/92


1. Any member of the Association wishing to appear before the Executive Board to present topics or concerns may do so by requesting the President place the member's name on the agenda for the next regularly scheduled Executive Board Meeting.
 - A. The President may at his/her discretion call a meeting of the Executive Board for presentation of a member's concerns.
 - B. The member will present a written statement to the Executive Board at the time of his/her appearance, which will be made a part of the official minutes of the Board Meeting.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 100.4 AREA Executive Board
	Policies & Procedures	DATE APPROVED 04/09/00
	Subject: Exchange of Memberships with CACRAO	DATE REVISED 04/09/00


On an annual basis, SCASFAA shall exchange, at no cost to either association, two complimentary affiliate memberships with the Carolinas Association of College Registrars and Admissions Officers (CACRAO). This exchange of complimentary memberships will provide each association a valuable professional connection on matters of mutual importance.

1. The two complimentary affiliate memberships in SCASFAA shall be granted to either the President or President-Elect of CACRAO (whichever one is from a South Carolina institution of higher education) and another elected officer of CACRAO who is from a South Carolina institution of higher education.
2. The current President and the Chair of the Counselor Relations Committee of SCASFAA shall each receive a complimentary membership in CACRAO.


The annual exchange of complimentary memberships shall remain in effect until such time as SCASFAA and/or CACRAO choose to discontinue the exchange.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 100.5 AREA Executive Board
	Policies & Procedures	DATE APPROVED 04/23/89
	Subject: CACRAO Representative(s)	DATE REVISED 04/14/02


1. The Chair of the Counselor Relations Committee shall appoint a representative or representatives to act as presenters at the annual CACRAO Guidance Counselors Workshops for his/her upcoming term of office. The representative(s) must be an Active member(s) of the association.
2. Representatives shall serve actively for one year as members of the Counselor Relations Committee with no prohibition or limit on the number of years one could serve.
3. Representatives shall be knowledgeable regarding all programs and processes. Each should possess the ability to articulate and present facts clearly and concisely in a personable and positive manner.
4. Travel expenses of representatives will be paid by SCASFAA in accordance with SCASFAA travel reimbursement policies.
5. The Financial Aid Director at the site of workshops should be notified and invited to attend if not a representative.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 101.1 AREA President
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: SASFAA Board Meetings	DATE REVISED 10/28/05


1. The Association President shall attend (or appoint a substitute officer as approved by the Executive Board to attend) the four SASFAA Executive Board meetings (held in July/August, October/November/December, February and June).
2. For the Association President (or approved substitute), lodging and meal expenses for attendance at SASFAA Executive Board meetings are paid by SASFAA. All other travel and miscellaneous expenses incurred by the Association President for attendance at SASFAA Executive Board meetings that are not paid for by SASFAA shall be borne by the Association in accordance with 107.6.
3. For the Annual SASFAA Conference, expenses (if not provided by SASFAA) for the President to attend shall be borne by the Association and include travel, lodging, meals, fees and miscellaneous expenses, in accordance with 107.6.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 101.2 AREA President
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: NASFAA Annual Conference	DATE REVISED 06/28/02


1. The Association President shall attend the Annual Conference of the National Association of Student Financial Aid Administrators.
2. It is strongly recommended that the Association President shall attend the NASFAA Board of Directors Meeting held in conjunction with the Annual Conference.
3. Travel expenses for the President to attend the annual NASFAA Conference shall be borne by the Association and include travel, lodging, meals and miscellaneous expenses, in accordance with 107.6. Note that registration fees, travel expenses (if traveling by air), and required room deposits are normally paid while serving as President-Elect – see 102.1(6).

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 101.3 AREA President
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Budget Line Items	DATE REVISED 04/21/99

1. The President has the authority to exceed any budget line item by 10% over the Treasurer's Authority.
2. Any expenditure exceeding 110% of the budget line item must be approved by the Executive Board.
3. Total expenditures may not exceed the total budget.


	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 102.1 AREA President-Elect
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Responsibilities	DATE REVISED 10/26/05

1. Shall serve as Parliamentarian.
2. The Association President-Elect is expected to attend the SASFAA Transitional Executive Board Meeting. Travel expenses (if not provided by SASFAA) for the President-Elect to attend shall be borne by the Association and include travel, lodging, meals, fees and miscellaneous expenses, in accordance with 107.6.
3. The Association President-Elect is expected to attend the SASFAA President-Elect Workshop. Expenses (if not provided by SASFAA) for the President-Elect to attend the Annual SASFAA Conference shall be borne by the Association and include travel, lodging, meals, fees and miscellaneous expenses, in accordance with 107.6.
4. The Association President-Elect is expected to attend the NASFAA Leadership Workshop. Travel expenses for the President-Elect to attend shall be borne by the Association and include travel, lodging, meals, fees and miscellaneous expenses, in accordance with 107.6.
5. While still serving as Association President-Elect, registration fees, travel expenses (if traveling by air), and required room deposits for the following year's NASFAA Conference shall be borne by the Association. Other reimbursable expenses related to attendance at the NASFAA Conference will be paid while serving as President – see 101.2.


	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 102.2 AREA President-Elect
	Policies & Procedures	DATE APPROVED April 23, 2006
	Subject: Student Success Scholarship	DATE REVISED

Beginning with the 2005-06 administrative year, funding will be set aside for the awarding of the South Carolina Association of Student Financial Aid Administrators' Student Success Scholarship. Scholarship funding will be provided for making individual student scholarship awards each year until the time when it is no longer financially responsible for the Association to do so or the Executive Board decides that providing such funding no longer is an organizational priority.


1. The President will recommend to the Budget Committee at the beginning of his or her term in office the amount of funding to be set aside in the operating budget for SSS awards during his or her term in office. Individual scholarships will be valued at \$1,000; no fewer than one (1) or more than five (5) scholarships will be funded for awarding annually.
2. Scholarship funding will be awarded to member institutions so that they can select scholarship recipients. The selection of the institution(s) that will receive funding for the awarding of SSS awards will be done through a drawing conducted by the President-Elect each year at the annual spring conference as noted in #3.
3. The name and the institution represented by each elected Executive Board member, appointed committee chairperson and active committee volunteer will be entered into a drawing. The committee chairperson will determine whether a volunteer has been active by considering whether the member participated and contributed in some manner to the committee's activity during the past year. Multiple participations will be given multiple entries into the drawing (eg. if a member is an elected officer and actively serves on three committees, his or her name and institution will be entered into the drawing four times). Only the names of individuals employed at educational institutions actively enrolling students at the time the selection pool is created will be entered into the drawing. Preparation for and administration of the drawing at the spring conference will be the responsibility of the President-Elect or his or her designee.
4. Scholarship funding will be provided to the selected member's institution within 30 days of the close of the spring conference.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 102.2 AREA President-Elect
	Policies & Procedures	DATE APPROVED April 23, 2006
	Subject: Student Success Scholarship	DATE REVISED


5. Scholarship recipient selection will be made in accordance with the selected institution's general scholarship guidelines for similar one-time awards. It is SCASFAA's intention that SSS awards be provided to the selected student recipient for enrollment period or periods prior to the next spring conference. SCASFAA's only restrictions for selection of the award recipient are that he or she be a South Carolina resident, be a full-time student enrolled at the awarding institution and be meeting the institution's satisfactory academic progress policy for eligibility for federal student aid. SCASFAA also asks that the recipient acknowledge receipt of the scholarship funding in writing to the Past President of SCASFAA during whose term the funding for the award was made available.
6. An annual accounting of prior year scholarship awarding will be made by the President-Elect at the spring conference and through Palmetto Pages.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 103.1 AREA Secretary DATE APPROVED 07/17/84 DATE REVISED 06/30/08 via electronic vote
	Policies & Procedures	
	Subject: Responsibilities	

1. Prepare minutes of Executive Board meetings and Association Business meetings and distribute copies of these minutes at subsequent meetings.
2. Order, distribute, and store Association stationery.
3. Maintain accurate lists (in Policies and Procedures Manual and on website) of:
 - Emerging Leaders
 - Fearless Nine
 - Quarter Century Members
 - Honorary Members
 - Lifetime Members
 - Distinguished Awardees
 - Meeting dates and locations
 - Executive Board members
4. Maintain a current Policies and Procedures Manual and assist in the typing and distribution of revisions.
5. Assist in formatting of Annual Reports and archiving of Association records.
6. Update and maintain annually a listing of members serving as Officers, Committee Chairpersons, and Committee Members. This list will include all members who have served since the creation of the Association.
7. By June 30, submit the following information for archival purposes:
 - Executive Board Minutes
 - Association Meeting Minutes
 - Policies and Procedures Manual
 - Committee Annual Reports
 - Association Publications
 - Programs
 - Brochures (if applicable)
 - Proceedings

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 104.1 AREA Vice President
	Policies & Procedures	DATE APPROVED 06/18/92
	Subject: Responsibilities	DATE REVISED 02/27/97

1. Shall serve as Chair of the Professional Development Committee.
2. Coordinate all training activities in the state including, but not limited to, the New Aid Officers Workshop, any NASFAA or Federal training conducted within the state and any advanced level training conducted by the Association.
3. Other duties as assigned by the President.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 105.1 AREA Treasurer
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Responsibilities	DATE REVISED 10/19/08

1. Bonding:

In accordance with the by-laws, the Treasurer, President, and President-Elect of the Association will be bonded at the expense of the Association for the amount of \$300,000 which has been determined by the Executive Board at its first meeting.

2. Receipt/Disbursement of Funds:


In accordance with the by-laws, the Treasurer of the Association shall be responsible for receiving, receipting, and disbursing all monies of the Association, and for keeping of adequate and appropriate records of such receipts and disbursements.

3. Financial Reports:

The Treasurer will submit a current financial report at each Executive Board meeting and at annual business meetings of the Association.

4. Banking:

The Treasurer, with approval of the President, will open a bank account for the Association. Signature cards will carry the signatures of the President, President Elect, and Treasurer, with only one signature required. Signature of both the Treasurer and President is required for any check written in excess of \$5,000.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 105A.1 AREA Treasurer
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Responsibilities	DATE REVISED 01/28/08

5. Request for Payment/Reimbursement:

All requests for payment or reimbursement must be submitted to the Treasurer on the proper Association form, along with appropriate documentation or receipts. The Treasurer will disburse funds for payments/reimbursements within ten days after receiving properly submitted requests.

6. Budget Override Authority:


The Treasurer has the authority to exceed any budget line item by \$500 over the approved amount with the exception of checks to hotels/meeting facilities for the Association's Fall and Spring meetings. The Treasurer has the authority to pay full bills for the meetings as approved by the Program Chairperson.

7. Vendor/Sponsor Support Coordinator:


All requests to vendors/sponsors and all offers from vendors/sponsors shall be coordinated by the Treasurer or the Vendor/Sponsor Committee, as determined by the President.

8. The Treasurer shall ensure that the required IRS documents, including Form 990, are prepared and filed by the required deadlines.


9. Shall serve as Chair of the Budget Committee. The committee shall consist of the President, the President-Elect, the Vendor/Sponsor Chairperson, a Past Treasurer and any other members as deemed appropriate by the President.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 105B.1 AREA Treasurer-Elect DATE APPROVED 10/07/07 DATE REVISED
	Policies & Procedures	
	Subject: Responsibilities	

1. The treasurer-elect is to learn to perform the various duties of the Office of Treasurer to facilitate a smooth transition to the position of Treasurer. The Treasurer-Elect position will afford the Association another means of financial quality assurance by having an assistant for the Treasurer. Additional training opportunities prior to assuming the position of Treasurer will assist with knowledge needed to successfully perform the duties of Treasurer.
2. The Treasurer-Elect will serve as an assistant to the Treasurer and participate in financial related activities of the Association at the Direction of the Treasurer.
3. The Treasurer-Elect will perform a quarterly financial review to assist with reconciliation of accounts on an ongoing basis.
4. The Treasurer-Elect will serve as an ex-officio member of the Budget Committee.
5. The Treasurer-Elect will attend the NASFAA leadership workshop the spring preceding term as Treasurer.
6. Travel expenses for the Treasurer-Elect to attend the NASFAA Leadership Conference shall be borne by the Association and include travel, lodging, meals and miscellaneous expenses, in accordance with 107.6.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 106.1 AREA Member-At-Large
	Policies & Procedures	DATE APPROVED 06/18/92
	Subject: Responsibilities	DATE REVISED 09/27/05


1. Shall serve as Chair of the Membership Committee.
2. Other duties as assigned by the President.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 107.1 AREA Fiscal Management
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Budget Codes	DATE REVISED 10/20/03

The Association budget shall be developed by the Budget Committee in accordance with the established budget code scheme. The Budget Committee shall recommend additional codes as they are needed.


REVENUE BUDGET CODES

<u>Budget Code</u>	<u>Revenue Category</u>
001	Balance Forward
003	From the Reserves Fund
005	Other Income
006	Research Conference
007	Prior Year Income
020	Membership Dues
030	Fall Meeting
040	Spring Meeting
050	Professional Development/Training
050.1	FACT Workshop
050.5	NASFAA Decentralized Training
050.7	Other Workshops
070	Vendors/Sponsors
070.1	Vendors/Sponsors: Fall Meeting
070.3	Vendors/Sponsors: Spring Meeting
070.5	Vendors/Sponsors: Newsletter
070.7	Vendors/Sponsors: Membership Directory
070.9	Vendors/Sponsors: Other
070.11	Vendors/Sponsors: FACT Workshop
070.13	Vendors/Sponsors: NASFAA Decentralized Training
070.15	Vendors/Sponsors: Other Workshops
080	Interest Income
080.1	Checking
080.2	CD
080.3	Money Market
090	Miscellaneous Income


	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 107.1 AREA Fiscal Management
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	Subject: Budget Codes	DATE REVISED 10/07/07

EXPENDITURE BUDGET CODES


<u>Budget Code</u>	<u>Expenditure Category</u>
101	President
102	President Elect
103	Vice President
104	Secretary
105	Treasurer
106	Member-at-Large
107	Treasurers-Elect
201	Membership Committee
202	Newsletter
203	Program-Fall Meeting
204	Program-Spring Meeting
205	Nominations & Elections Committee
206	Legislative Relations Committee
207	Consumer Relations Committee
208	President's Contingency
209	Miscellaneous
210	Advance Planning
211	Prior Administration
212	Minority Concerns Committee
213	Professional Development Committee
213.1	FACT Workshop
213.5	NASFAA Decentralized Training
213.7	Other Workshops
214	Research Committee
215	Counselor Relations Committee
216	Reserve Fund - Regular
217	Proprietary Concerns
218	Cultural Diversity
219	Liaisons: State/Lender/Guaranty Agency
220	Reserve: SASFAA Conference
221	Long Range Planning Committee
222	Vendors/Sponsors Committee
223	Communications Committee
224	Site Selection Committee
225	Special Projects
226	Transitional Expenses
227	Insurance and Bonding
228	Electronic Services

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 107.2 AREA Fiscal Management
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Proposed Budget	DATE REVISED 04/06/97


1. The Budget Committee shall prepare a tentative budget to be presented to the Executive Board for approval at its first meeting of the new fiscal year.
2. The Executive Board shall review the tentative budget prepared by the Budget Committee and, based on the recommendations of the Committee, approve an annual budget for the Association.
3. The Association shall operate on a tentative budget based on that of the previous year until the new budget is approved by the Executive Board at its first meeting.
4. The Treasurer is authorized to disburse funds based on the prior year budget for expenses incurred prior to the approval of the new budget by the Executive Board.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 107.3 AREA Fiscal Management
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Approved Budget	DATE REVISED 06/18/92

A copy of the budget, once approved by the Executive Board, shall be distributed by the Treasurer to the membership at the Association's Fall meeting.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 107.4 AREA Fiscal Management
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Review of Financial Records	DATE REVISED 10/20/08


1. In accordance with the by-laws, the financial records of the Association shall be reviewed at the conclusion of each fiscal year.
2. The financial review of the Association's financial records shall be conducted by the immediate past Treasurer. If this is not possible, the President shall appoint another past Treasurer to review the records.
3. The financial review shall be performed in accordance with the Guide to Financial Planning and Management Guidelines & Procedures.
4. The past Treasurer shall present a report of the financial review to the Executive Board by the second meeting of the fiscal year.

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	Policies & Procedures	DATE APPROVED 07/17/84 DATE REVISED 10/19/08
	Subject: SCASFAA Financial Review Guide	

(Assumes use of Microsoft Money)

Items Needed for Review or Audit

1. Prior Year Financial Review Report
2. Prior Year Final Statement of Revenue and Expenditures
3. Prior Year IRS Form 990
4. Final Statement of Revenue and Expenditures
5. Final Statistics Report
6. Final Other Income Report, if applicable
7. Final Sponsor Revenue Report
8. Executive Board Minutes
9. Notes and Budget Construction Worksheet from Budget Committee meeting
10. Monthly Statements including Checking, Money Market, Certificates of Deposit and Credit Card(s)
11. Conference/Workshop Registration Information
12. Membership Applications
13. Membership Roster
14. Backup for Income and Expenses
15. Expenditure Vouchers
16. Travel Expense Vouchers
17. Insurance and Fidelity Bond Policies
18. Printed copy of final bank reconciliation and/or proof of monthly reconciliation from "Money"
19. Policies & Procedures Manual, Guide to Financial Management and Guidelines & Procedures for the Office of Treasurer
20. Asset List

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 107.5 AREA Fiscal Management
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: SCASFAA Financial Review Guide	DATE REVISED 09/27/05

Review Procedures

Executive Board Minutes


1. Review all Executive Board minutes to ensure approval of the annual budget and any Board action(s) pertaining to the budget including approval of overages and adjustments.

Statement of Revenue and Expenditures Proof

1. Total of all Assets from Prior Year Final Statement of Revenue and Expenditures
+ Income
- Expenses
= Total of all Assets from Final Statement of Revenue and Expenditures

Bank Statements (Checking and Money Market)

1. Ending Balance of the June 30 Bank Statement
- Outstanding Checks
+ Outstanding Deposits
= Ending Balance on Statement of Revenue and Expenditures
2. Verify that the first and last check numbers from the checkbook agree with check register in "Money" and that all checks are accounted for.
3. All voided and spoiled checks should be clearly marked and kept with the check stubs. The check register should be reviewed in "Money" to confirm that the checks have been voided. (In "Money" the void will be reflected in the Balance column.)

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4. Perform a random check to ensure that documentation from “Money” reflects that accounts were reconciled monthly.

Certificate of Deposit Statements

1. Verify that the last statement for each CD matches the balance on the Statement of Revenue and Expenditures.

Expenditure Vouchers


1. Review a random selection of expenditure vouchers to verify that all were paid timely, properly posted and included the appropriate approvals. Several “large” payments should be reviewed as well as several other random payments.
2. Verify that checks written for \$5,000 or more are approved by the President.
3. Verify that any check written to the Treasurer is signed by the President.

Travel Expense

1. Verify that travel expenses conform to Policies and Procedures 101.2, 102.1, and 107.6.
2. Verify that expenses paid directly by SCASFAA are not paid a second time on a travel expense voucher or credit card statement.

Sponsor Revenue

1. Verify that the income accounts reflected on the Statement of Revenue and Expenditures match the Sponsor Revenue report.
2. Note any outstanding sponsor revenue.

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	Policies & Procedures	DATE APPROVED 07/17/84 DATE REVISED 09/27/05
	Subject: SCASFAA Financial Review Guide	

Random Deposit Verification


1. Perform a random check of deposits in “Money” and trace the deposit to the bank statement. Several “large” deposits (including some conference registrations) should be reviewed as well as several other random deposits.

Membership Roster Verification

1. The total number of paid members accounted for on the spreadsheet
x the amount of membership dues
= the amount of income in line item 020
2. Verify a random sample of membership applications to the membership roster and a sample of those included on the roster back to the applications.

Signed IRS Form 990

1. Verify that the IRS Form 990 was filed timely with appropriate signatures.
2. Verify that the Total Revenue, Total Expenses and Net (Total) Assets on the 990 agree with the Statement of Revenue and Expenditures for the applicable fiscal year.

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	Policies & Procedures	DATE APPROVED 07/17/84 DATE REVISED 10/19/08
	Subject: SCASFAA Financial Review Guide	

Insurance Liability Policies


1. Verify that the fidelity bond insurance is sufficient for the account balances.
2. Review the coverage for the Commercial General Liability policy and the Directors and Officers Liability policy and make recommendations for any needed adjustments in coverage.

Policies & Procedures Manual, Guide to Financial Management and Guidelines & Procedures for the Office of Treasurer

1. Verify that all applicable policies and procedures are being followed.

Asset List

1. Review the prior year asset list and compare to the current list for additions or deletions. If there are changes from prior year, verify through minutes of the Executive Board that the addition or deletion was approved.
2. Review who has possession of the equipment and randomly verify the accurateness of who has possession.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 107.6 AREA Fiscal Management
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Travel	DATE REVISED 10/26/05

Only expenses identified through the budget process or specifically authorized by the Executive Board may be paid by the Treasurer or may be reimbursed to individuals submitting claims. The section “Reimbursable Items:” identifies specific expenses covered by the Association.

In order to facilitate efficient administration of Association travel, the following procedures have been adopted.


1. Manner of Payment

Unless an advance is authorized by the President, travel will be on a reimbursement basis. Travel claims will be paid by the Association Treasurer. The Treasurer is authorized to disallow any travel claims or portions thereof that are judged, in consultation with the President, to be unreasonable. A Travel Expenses Voucher that indicates the purpose of the meeting must be completed and submitted with a copy of the meeting details. All claims must be submitted within 30 days of the time travel was undertaken. Claims not submitted within 30 days may be disallowed.

2. Reimbursable Items:

A. Travel

- (1) Private auto mileage at the rate currently allowed by the IRS, not to exceed the cost of air coach. If the traveler chooses to travel by personal vehicle instead of by air (for trips that exceed 500 miles round trip) reimbursement cannot exceed the cost of a coach-class ticket.
- (2) Air travel will be reimbursed for coach travel only. A copy of the airline ticket must accompany the travel claim.
- (3) Incidental expenses for taxis, airport buses and airport limousines will be reimbursed at actual costs, including tip if appropriate. Receipts or copy of tickets, exceeding \$10.00 must be submitted with claim.

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	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Travel	DATE REVISED 01/28/08

B. Lodging

The Actual cost of lodging, not to exceed the single room rate at the hotel/motel where lodged, will be paid. Receipts from the hotel/motel must accompany the claim.

C. Meals

The cost of meals will be paid not to exceed \$43.00 per day. For fractional portions of a day or if meals are provided, the \$43 limit will be prorated as follows:


- \$8 for breakfast, if you depart before 6:30 AM and return after 11:00 AM
- \$10 for lunch, if you depart before 11:00 AM and return after 1:30 PM
- \$25 for dinner, if you depart before 5:15 PM and return after 8:30 PM

D. Fees

Actual costs of conference and registration fees will be paid. Upon approval of the President, such fees can be paid in advance if requested on an official conference registration form.

E. Rental Auto

Use of a rental automobile must be approved in advance by the President or Treasurer.

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	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Travel	DATE REVISED 06/21/04

F. Miscellaneous Expenses

Miscellaneous expenses, such as those listed below will be reimbursed. Receipts for expenses exceeding \$10.00 should accompany claims.

- (1) Telephone calls necessary for Association business
- (2) Tips, other than for meals or beverages
- (3) Limousines, taxis, parking, etc.

3. In-State Travel on Behalf of the Association by Officers, Committee Chairs and Committee Members


The Association will partially reimburse mileage expenses from home institutions for officers, committee chairs and committee members, upon request, for attendance at officially called committee meetings and for officers and committee chairs at Executive Board meetings held separately from conferences. Committee chairs should schedule meetings in locations that will minimize travel for committee members.

Reimbursement may not be requested for travel when a committee meeting is held in conjunction with a major Association function (such as the Fall and Spring conferences, Decentralized Training, etc). In addition to the above restrictions, private auto mileage equal to the State rate as of July 1 may be requested if:

1. Round trip travel equals or exceeds 50 miles, and
2. The appropriate committee chair has budgeted for travel and has funds available, and
3. The member's institution/agency is unwilling/unable to reimburse the travel expense.
4. The request is submitted within 30 days of the meeting.

This section does not apply to travel covered under other sections of this manual. The President may approve travel reimbursement for other situations not covered by this section on a case-by-case basis.

4. Travel allowances shall be reviewed annually and increased as appropriate.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 107.7 AREA Fiscal Management
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Other Expenses	DATE REVISED 04/06/97

The Association will defray the cost of budgeted expenses incurred on behalf of the Association by authorized individuals. Individuals authorized to make purchases on behalf of the Association include all officers and chairpersons of committees with approved budgets.


In order to facilitate efficient management of Association expenses, the following procedures have been established.

1. Manner of Payment

Expenses shall normally be handled on a reimbursement basis. An appropriate Association Expenditure Voucher will be utilized that shows a complete description of the items purchased. All claims must be submitted within 30 days of the time the purchase was made and must be accompanied by appropriate purchase invoice(s). Claims not submitted within 30 days may be disallowed.

2. Reimbursable Items:

- A. Equipment purchased on behalf of the Association which is required for conducting Association business. Such equipment shall become the property of the Association.
- B. Printing of Association materials such as stationery, programs, pamphlets, directories, newsletters, etc.
- C. Office supplies, postage, and miscellaneous items.
- D. Rental of equipment such as tape recorders, audio-visual, etc.
- E. All other Association expenses.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 107.8 AREA Fiscal Management
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Registration Fees for Meetings	DATE REVISED 09/08/08

The Association shall normally defray the cost of all official meetings of the Association through use of a meeting Registration Fee. The amount of such Registration Fees shall be determined by the Budget Committee. Registration fees are designed to cover the costs necessary to conducting of meetings and it is the policy of the Association that Registration Fees not result in substantial profit to the Association.

To insure clear and efficient administration of Registration Fees, the following procedures have been established.

1. Charging of Registration Fees to Members


- A. Registration Fees shall be collected from all individuals attending all or any part of official Association meetings for which a fee is charged, except as provided for elsewhere in this policy.
- B. Exceptions may be approved for program participants and resource persons with concurrence of the chairperson of the Program Committee, Association Treasurer, and Association President.
- C. Meeting registration not cancelled prior to the registration deadline must be paid in full even if the member does not attend.

2. Complimentary Registrations

Invited guests and non-member presenters and speakers shall receive complimentary registrations at Association meetings with the concurrence of the President, Treasurer and Program Committee Chairperson.

3. Meeting and Registration Refunds

Meeting registration(s) may be cancelled prior to the registration deadline for a full refund. After the meeting registration deadline, the meeting fee may only be transferred to another attendee of the same meeting. Exceptions will be left to the discretion of the President and Treasurer.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 107.9 AREA Fiscal Management
	Policies & Procedures	DATE APPROVED 10/01/90 DATE REVISED 06/23/08
	Subject: Sponsorship	

Note:

On June 26, 2007 the SCASFAA Board adopted temporary, working Sponsorship Guidelines that shaped the sponsorship activities for the 2007-08 year. This was done to accommodate the fluid nature of events that transpired during the course of the year. Those Sponsorship Guidelines form the basis for the attached policies and procedures.

I. Committee Name

The name of this committee shall be Sponsorship.

II. Committee Composition

The committee shall consist of the chair and as many association members as needed, to be determined by the chair. Membership on the committee may only include those from schools and not any members affiliated with sponsors or potential sponsors.

III. Purpose


The purpose of sponsorship committee is to assist the association with financial support in order to provide quality conferences, training activities, and professional development opportunities at reasonable costs. All sponsorship-related activities must be conducted through the sponsorship committee. Sponsors are expected to adhere to the association’s policies and procedures.

IV. Sponsorship Rate

The assessed sponsorship rate shall be determined annually by the Executive Board prior to, or at the annual transitional meeting. This determination shall be for the following year. This enables the Sponsorship Chair to conduct the sponsorship committee’s solicitation and related activities for the new year without delay at the beginning of the year.

The annual sponsorship rate shall include the following:

- One exhibition space at the association’s annual conference(s)
- Advertisement in the association’s newsletter
- Advertisement on the association’s web site

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	Subject: Sponsorship	DATE REVISED 06/23/08

Advertising size, shape and frequency and placement shall be at the discretion of the Newsletter editor for the newsletter, and the chair of the Electronic Services committee for the web site ads in consultation with the Sponsorship Chair.

The sponsorship rate for the 2008-09 year shall be \$2000.

V. Policies

a. Targeted, Specific Item or Event Sponsorship

The association will not seek or accept sponsorship for specific association activities or events such as dinners, lunches, conference lanyards, conference bags or portfolios, refreshment breaks, program printing, etc... Categories or tiers of support and designation of sponsorship according to levels such as Patron, Sponsor, Contributor and Friend are eliminated. Financial support for the general activities of the association will not be tied to any particular item or event.

b. Advertising


Advertising in both the association's newsletter and web site will be included in the annual sponsorship rate.

c. Complimentary Membership and Conference Registrations

There shall be no complimentary membership in the association or complimentary conference registrations offered to any sponsor resulting from their sponsorship commitment. Sponsors will need to follow regular membership application procedures and pay the association's membership fee and conference registration fee for all organization representatives of the sponsor at annual conference(s). Both of these processes are provided for on the association's web site.

d. Door Prizes

Sponsor-provided door prizes and scholarships will not be permitted at any conference or association sponsored event.

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	Policies & Procedures	DATE APPROVED 10/01/90 DATE REVISED 06/23/08
	Subject: Sponsorship	

e. Limitation on Marketing Items during Events

At association conferences or any association event, sponsors are prohibited from providing any marketing items with a value in excess of \$10. Items of nominal value such as pens, pencils, note pads and other office supply-type items are acceptable as long as their value is under \$10.

f. Sponsored Food/Beverage Events

If a sponsor wishes to provide any type of food or beverage event for an association event, the event must be open to all attendees or members. Additionally, it must be clear that all attendees or members are invited and no limited, targeted or special invitations shall be permitted. Should a sponsor wish to do this, it must be approved by the association President and Sponsorship Chair at least two weeks prior to the event and communicated to the attendees or membership. Any such events must be executed through the association.

g. Sponsor Provided Dinners/Lunches/Other Activities at Association Events

Sponsors are not permitted to provide any type of meal, entertainment, or other recreational event to members either on- or off-premises during an association sponsored event, other than one that is provided for the entire membership as stipulated under these policies.


h. Sponsorship Recognition

The association wishes to recognize the support that it receives from our sponsors. We will print a list of sponsors in our conference programs in alphabetical order with no specific designation other than the sponsors' name. We will do likewise with other association sponsored training events and workshops as appropriate. We will also list the sponsors' names on our web site.

There will be no association-sponsored appreciation reception or any other type of association-sponsored appreciation event for our sponsors.

i. Right of Refusal

The association reserves the right to refuse sponsorship to any entity for any and all association-related activities

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	Policies & Procedures	DATE APPROVED 10/01/90 DATE REVISED 06/23/08
	Subject: Sponsorship	

VI. Accessing Sponsorship Information through the Web

The Sponsorship Chair will update the sponsorship section of the association's web page each year. Information for the Sponsorship section, including the on-line sponsorship form should be provided to the chair of the Electronic Services committee for posting to the web site. Planning for these changes should occur well in advance of the beginning of the new year.

Shortly after the start of the new year (July), the Sponsorship Chair will send e-mail notices to all potential sponsors for the upcoming year. The e-mail will provide the sponsors with relevant information about sponsorship for the year, and also direct them (link) to the Sponsorship section of the association's web page.

Sponsors will access all sponsorship information, including selecting and completing their sponsorship commitment through the association's web site. The site will provide sponsorship information and policies and an on-line form that will permit the sponsor to commit to their sponsorship. It will also automatically generate and on-line invoice for them. The invoice can be printed and mailed back to the Treasurer of the association along with the sponsor's remittance. Payment should be submitted within 30 days of creating the invoice. The Sponsorship Chair will work very closely with the Treasurer to ensure payment is received.


VII. Exhibiting

a. Additional Space

If space permits, requests for additional exhibition space beyond one booth space must be made to the sponsorship chair and an additional charge will be assessed. The charge will be set by the sponsorship chair with the approval of the President and Treasurer.

b. Exhibition Management (Drayage)

At some conference venues, the hotel may require that the entire exhibition process be coordinated by an exhibition or event management company. The Sponsorship Chair, in concert with the Program Chair should ascertain the specific exhibit policy of the host hotel and then coordinate the activities in accordance with the hotel policy.

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	Policies & Procedures	DATE APPROVED 10/01/90
	Subject: Sponsorship	DATE REVISED 06/23/08

c. Exhibitor Shipping of Materials


It will be the responsibility of the Sponsorship Chair to inform the exhibitors of the relevant information regarding the shipping of exhibitors' materials whether it be direct shipping to the hotel, or an exhibition management company used by the conference hotel.

d. Exhibit Layout

The Sponsorship Chair, in concert with the Program Chair, should design and produce an exhibit layout showing the exact location and placement of the exhibit spaces. Careful attention should be paid to locating the exhibit space in an area of heavy traffic or within close proximity of the session meeting rooms.


VIII. Special Projects

Sponsorship may be sought to offset costs of special projects at the discretion of the President and Executive Board.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 107.10 AREA Fiscal Management
	Policies & Procedures	DATE APPROVED 06/18/92 DATE REVISED 06/18/92
	Subject: Reimbursement Vouchers	

1. Expenditure Voucher


- Travel Reimbursement Voucher

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 107.11 AREA Fiscal Management
	Policies & Procedures	DATE APPROVED 02/04/00
	Subject: Memorials	DATE REVISED 02/04/00

At the discretion of the President, SCASFAA shall donate a memoriam should one of the following events occur:


1. In the event of the death of a current member of the Association, on behalf of the Association, a \$100 memoriam shall be made (from Expense Account 209-Miscellaneous) in memory of the member to a fund designated by the member's family.

2. In the event of the death of an immediate family member of a member of the current Executive Board, on behalf of the Executive Board, a \$25 memoriam shall be made (from Expense Account 209-Miscellaneous) in memory of the Executive Board member's family member to a fund designated by the member of his/her family. Immediate family member shall be defined as a spouse, parent, child or sibling.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 107.12 AREA Fiscal Management
	Policies & Procedures	DATE APPROVED April 23, 2006
	Subject: Credit Cards	DATE REVISED 01/28/08


Credit cards are secured for the President, President-Elect and Treasurer. This practice allows these designated officers to cover SCASFAA related expenses without the use of personal or institutional funds. Guidelines for the acquisition and use of credit cards include the following:

1. The Treasurer shall secure credit cards for official SCASFAA business use by the President, President-Elect and Treasurer.
2. The credit line of each card shall be \$3,000.
3. The credit card bill for each card will be sent to the Treasurer.
4. The use of the credit card should not be to circumvent Policies & Procedures outlined in 107.6 and 107.7. The credit card is to be used at the discretion of the card holder.
5. Expenses charged to the credit card shall be reported using the appropriate SCASFAA expense form, including receipts and descriptions of all charges reported. The Treasurer should also be notified via email immediately when a charge has been made. The notification should include the date, amount, the company name and a brief description of the charge.
6. Cardholders shall surrender their cards to the Treasurer within 10 days of the expiration of their term of office or at the direction of the President, whichever occurs first. In those years when the Treasurer's position changes, the outgoing Treasurer is responsible for collection and redistribution of all credit cards.
7. Charging personal expenses to the credit card is prohibited and fraudulent use could lead to prosecution.
8. Violation of card use policies may result in cancellation of credit card privileges. The Treasurer is responsible for notifying the Executive Board of misuse of the credit card, and the Executive Board has the sole authority to suspend privileges.


	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 108.1 AREA Site Selection
	Policies & Procedures	DATE APPROVED 07/17/84 DATE REVISED 06/30/08
	Subject: Procedures	

In order to provide for a consistent and efficient site selection process, the following procedures have been established:

1. The President shall appoint a site selection chair. The Chairperson shall recommend, for the approval of the Executive Board, a site and facility for the association's annual conference 2 years in advance of the conference. (Example: The 2007-2008 Site Selection Committee will recommend approval for the 2009-2010 annual conference.) In determining potential dates for future annual conferences, the Executive Board and site selection committee should consider traditional annual events and holidays affecting the membership as well as the dates for already scheduled events including conferences for other state financial aid associations with proximity to SCASFAA.
2. The Chairperson shall bring recommendations to the Executive Board for approval.
3. The Chairperson shall be a member of the Executive Board and shall appoint a committee to assist with site selection. The committee shall solicit potential sites from the membership in a manner to be determined by the Chairperson.
4. The Committee shall contact hotels in the cities that are possible locations for an annual conference that may be held either during the Fall or Spring in order to determine the feasibility of having the meeting at that facility. The Committee may request brochures, food and beverage prices, written proposals or any other written information or materials it deems necessary. If the Chairperson feels it appropriate, the Chairperson and/or one or more members of the Committee should visit each possible facility in order to accurately assess its potential.
5. In assessing the potential of possible meeting facilities, the site selection checklist should be used as a guide by the Committee.

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	Policies & Procedures	DATE APPROVED 07/17/84 DATE REVISED 06/30/08
	Subject: Procedures	

6. Upon completion of the visitation process, the Committee shall compare the facilities, services, and benefits of each site and determine a recommendation to be made to the Executive Board. No written agreement or contract with a facility shall be signed on behalf of the Association until approval by the Executive Board has been received.
7. Site Selection Checklist
- A. Registration and Guest Room
1. How many rooms are available?
 2. What are the room rates?
 3. What is the policy on complimentary rooms?
 4. Will the hotel provide room reservation form or on-line process?
 5. Is an advance deposit required?
 6. At what point are unreserved rooms released?
 7. Do the rooms have high speed Internet? Wireless Internet? Associated charges?
 8. Will the hotel honor government rates in lieu of conference rates?
 9. Do the rooms have flat rate charges or do the rates increase with a second, third, or fourth occupant? If so, how much per person?
 10. What is the cancellation policy for rooms?
- B. Meeting Rooms
1. How many meeting rooms are available?
 2. What are the rates?
 3. What are their capacities?
 4. Are there pillars or obstructions in the room?
 5. Is audio-visual equipment readily available?
 6. Are there distractions (open windows, outside noise, etc.) in the meeting area?
 7. Do the Meeting Rooms have high speed Internet? Wireless Internet? Associated charges?
 8. Are there sufficient meeting rooms available to accommodate the number of expected concurrent sessions?


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	Policies & Procedures	DATE APPROVED 07/17/84
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C. Exhibit Area

1. How many square feet are available?
2. Is there easy access for loading/unloading?
3. Is the lighting adequate?
4. Is exhibit area near the meeting rooms?
5. What are the rates? Are there extra charges for tables, chairs, etc.
6. Does the exhibit area have high speed Internet? Wireless Internet? Associated charges?
7. Is a drayage company involved? If so, how are the charges calculated and billed?
8. If applicable, will electricity or Internet access be billed through the hotel or through a drayage company?
9. Is there adequate security? Can the exhibit area be locked when not in use?

D. Hotel Appearance

1. How would you rate:
 - a. guest rooms?
 - b. meeting rooms?
 - c. lobby area?
2. How would you rate:
 - a. furnishings and decor?
 - b. housekeeping?
 - c. food service?
 - d. check-in and front-desk service?
 - e. attitude of personnel?

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 108.1 AREA Site Selection
	Policies & Procedures	DATE APPROVED 07/17/84 DATE REVISED 06/30/08
	Subject: Procedures	

E. Hotel Services

1. Is there a parking charge?
2. Will SCASFAA registration area be convenient?
3. What types of equipment, technical equipment, etc. are available?
4. What types of restaurants, entertainment, and sports facilities are available?
5. What types of shops, etc. are convenient?
6. What types of transportation are available?
7. Does the hotel have airport pick-up for special guests?

F. Food Service


1. Are the banquet and luncheon menu varied as to selection and price?
2. Will the hotel change specific items on a given menu?
3. When must a guarantee be given for a meal function?
4. How many additional places, above the guarantee, will the hotel set?

G. Accounting

1. Master billing?
2. Package pricing for audio-visual?
3. Credit requirements?

H. Miscellaneous


1. Are there special features that make the hotel unique?
2. Are there other major conventions booked for the same dates?
3. Are the hotel facilities available if we were to begin the convention one day earlier?
4. Anticipate that hotel and sales staff used through the site selection and planning process will change prior to the start of the conference. **KEEP COPIES OF ALL WRITTEN, E-MAIL, CONTRACTURAL, AND VERBAL CORRESPONDENCE FOR ASSOCIATION REFERENCE.**

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 109.1 AREA Nominations
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Procedures	DATE REVISED 01/28/08

Since the strength of an organization is reflected in those who lead, the Association encourages all Active members to serve in leadership positions. It is the policy of the Association to seek out and encourage its best-qualified members to run for office in the Association. Responsibility for adherence to this policy is housed with the Nominations and Elections Committee.


To facilitate maintenance of a sound and equitable nomination process, the following procedures have been adopted:

1. The chairperson of the Nominations and Elections Committee shall be the Past-President.
2. The Chairperson of the Nominations and Elections Committee shall establish a deadline for, and solicit nominations from the membership through all appropriate means. An announcement calling for nominations shall be published in the Association Newsletter prior to January 1.
3. The Committee must present to the Association a dual slate of candidates for all offices for which at least two nominees agree to run. A candidate for office shall not serve as a member of the nominations and elections committee. Should this occur, the nominated individual should resign from the committee (if s/he agrees to run) and the Chair of the committee shall seek out a substitute to the committee.
4. Once the Committee has developed its list of qualified individuals, the Committee shall contact the top two individuals by telephone to determine if they will accept nomination and run for office. If one or both individuals decline the nomination, the Committee will then contact the other nominees in order as they appear on the list. If sufficient individuals have not been nominated in order for the Committee to present a nominee for each office, the Committee shall approach any active member whom the Committee feels is qualified for that office to determine if they will accept nomination.
5. Once the Committee has determined its slate of candidates for office, the Chairperson will forward this slate to the President.


	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 109.1 AREA Nominations
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Procedures	DATE REVISED 01/28/08

6. Upon completion of the nominations process, the Chairperson shall forward to the editor of the newsletter the slate of candidates and the copy-ready biographical information and statements of candidacy provided by each candidate for inclusion in the newsletter preceding the Annual Spring Meeting. The Chairperson shall also announce that nominations will be accepted from the floor for any office so long as those individuals nominated on the floor can supply the required biographical information and written statement of candidacy to all members present.

7. Upon their acceptance, the Committee will provide each candidate a copy of the currently approved Campaign Guidelines.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 109.2 AREA Nominations
	Policies & Procedures	DATE APPROVED 10/14/93
	Subject: Campaign Guidelines	DATE REVISED 02/27/97


1. Each candidate will be featured in the edition of the SCASFAA Newsletter published prior to the Spring Meeting. Each candidate will be asked to provide biographical information and a statement of candidacy. The entire statement shall be no longer than 500 total words.
2. Copies of the candidates' biographical information and statements of candidacy will be available at the Conference.
3. Each candidate is introduced at the initial business meeting of the Spring Conference and given three minutes to address the membership.
4. Candidates are not permitted to distribute campaign paraphernalia such as buttons, pins, ribbons, stick-ons, or printed sheets of paper or cards.
5. No hospitality suites or other giveaway promotions are to be held in support of any candidate.
6. No solicitation of the SCASFAA membership (excluding the information contained in the newsletter) shall be made by, or on behalf of the candidate prior to, or during the conference.
7. No campaigning will be permitted in the immediate vicinity of the polls.
8. Violations of campaign guidelines will be brought before the Executive Board. Intentional violation may result in forfeiture of candidacy.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 110.1 AREA Elections
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Procedures	DATE REVISED 01/28/08


The election of Association officers shall be conducted at the Annual Conference held in the spring. Responsibility for conducting the election shall rest with the Nominations and Elections Committee.

In order to insure an efficient and equitable election process, the following procedures have been established:

1. An official business meeting of the Association shall be held early in the Annual Conference for purposes of presenting the candidates recommended by the Nominations and Elections Committee as well as for accepting nominations from the floor.
2. The Chairperson of the Nominations and Elections Committee shall introduce to the membership each individual on the slate of candidates recommended by the Committee. After these individuals have been introduced, the President shall call for nominations from the floor in accordance with the accepted procedures. In the event of floor nominations, copies of biographical information and statements of candidacy sufficient for all members present must be available, as required by the Nominations and Elections Committee.
3. Once the nomination process has been completed, the Chairperson of the Nominations and Elections Committee shall announce the schedule and location of the polls. The exact schedule that the voting poll shall be open will be determined by the Nominations and Elections Committee, but must open by 9:00 a.m. on the morning following the business meeting at which the final slate of candidates was determined and close not later than 5:00 p.m. on the day preceding the business meeting at which the results are to be officially announced.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 110.2 AREA Elections
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Voting Procedures	DATE REVISED 01/28/08


1. All current members of the Association may vote in Association elections.
2. Current members may vote via the Association website. The procedures and deadline for voting shall be announced by the Chairperson in the newsletter at the time nominations are published.
3. The polling place shall be staffed continuously by the Nominations and Elections Committee or by designees of the Committee Chairperson. So that the polling place may be properly staffed by Nominations and Elections Committee members, it is highly recommended that only those volunteers who are planning to be in attendance at the Annual Conference be selected to serve as members of the Committee.
4. The Chairperson of the Committee shall be responsible for the safekeeping of the election results.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 110.3 AREA Elections
	Policies & Procedures	DATE APPROVED 06/18/92
	Subject: Official Ballot	DATE REVISED 10/07/07


Official ballots shall include the appropriate offices and the names of the candidates submitted by the Nominations and Elections Committee for those offices.

The Association's elected offices consist of:

President-Elect
Vice President
Secretary
Treasurer-Elect
Member-At-Large

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 110.5 AREA Elections
	Policies & Procedures	DATE APPROVED 06/18/92 DATE REVISED 01/28/08
	Subject: Tabulation of Votes/Runoffs	

1. Once the voting has been completed, the votes shall be tabulated by the Nominations and Election Committee. A majority of all votes cast for each office is necessary for declaration of a winner for that office.
2. Upon completion of the vote tabulation, the Chairperson of the Committee shall report the results to the President and indicate whether a runoff is necessary. Once the President has been notified, the Committee shall inform each candidate privately of the results prior to the announcement to the membership.
3. The results of the election shall be officially announced at the final business meeting of the Association. At the discretion of the President, the results may be announced unofficially prior to the final business meeting so long as all candidates have been previously notified.
 - In the event that no candidate receives a majority of votes cast, a runoff election for that office will be held. All members will be provided the opportunity to vote in a runoff election.
 - Notification of the runoff election and procedures to follow will be posted on the SCASFAA Listserv within one week of the tabulation of votes at the Spring Conference.
 - A runoff ballot will be prepared and posted on the SCASFAA website within one week of the close of business of the SCASFAA Business Meeting.
 - Members will vote within 7 days of the runoff ballot being posted to the website.
 - Upon closing of the runoff ballot, votes shall be tabulated by the Chairperson of the Committee. The chair shall disseminate the results to the full committee, the President, and the runoff candidates.
 - Results will be announced on the Listserv after the candidates are notified of the outcome of the runoff election.


	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 111.1 AREA Bestowed Memberships
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Honorary Memberships	DATE REVISED 02/27/92

The Association shall grant "Honorary Membership" to those individuals who, in the judgment of the Executive Board, warrant such recognition. Nominations for recipients of the award should be made to the President of the Association, or to the Chairperson of the Membership Committee, to be voted on by the Executive Board.

Honorary Membership shall be awarded to those members of SCASFAA who have distinguished themselves to the membership by their service, and who leave the profession of financial aid, or leave SCASFAA. Honorary Membership grants the following rights and privileges:

- A. Shall not pay the annual dues, and
- B. Shall be listed annually in the Association's Membership Directory, and shall receive all Association mailings and materials, and
- C. Shall not pay the full Registration Fees at annual meetings, but only that portion of the Registration Fees which are designated for meals, and
- D. Shall be responsible for other expenses related to attendance at SCASFAA meetings, such as meals, transportation, and lodging.
- E. Recipients of Honorary Membership, who return to the status of active or affiliate membership shall be entitled to all of the privileges of the active affiliate membership, upon payment of the annual dues of the Association.
- F. The following have been voted by the Executive Board as Honorary members:


Mr. John Burns
Ms. Lynn Christian
Mr. Ray Edwards
Mr. Dan Franz
Mrs. Sylvia Hudson
Mr. Cannon Mayes

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 111.2 AREA Bestowed Memberships
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Lifetime Memberships	DATE REVISED 10/07/07

The Association shall grant "Lifetime Membership" to those individuals who, in the judgment of the Executive Board, warrant such recognition. Nominations for recipients of the award should be made to the President of the Association, or to the Chairperson of the Membership Committee, to be voted on by the Executive Board.


"Lifetime Membership" shall be granted to those Charter Members, and to those members of SCASFAA who have honored themselves and SCASFAA with their service and their devotion, and who are retiring from the profession of financial aid. Lifetime Membership grants the following rights and privileges:

- A. Shall not pay the annual dues, and
- B. Shall be listed annually in the Association's Membership Directory, and shall receive all Association mailings and materials, and
- C. Shall not pay the Registration Fees at annual meetings, and shall be guests of the Association for banquets, and
- D. Shall be responsible for other expenses related to attendance at Association meetings, such as transportation and lodging.
- E. Recipients of Lifetime Membership who return to the status of active or affiliate membership shall be entitled to all of the privileges of the active or affiliate membership, upon payment of the annual dues of the Association.
- F. The following are Lifetime members:
 - Mrs. Dot Carter
 - Mr. Thurston Delainie
 - Mr. Ian (Mac) Hubbard
 - Mr. Kenneth Player
 - Mrs. Alice Suiter
 - Ms. Miriam Wilson
 - Dr. Charles Witten
 - Mr. William Mackie
 - Mrs. Jennifer (Jones-Gaddy) Bomar
 - Mrs. Sallie Glover

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 111.2 AREA
	Policies & Procedures	Bestowed Memberships DATE APPROVED 07/17/84
	Subject: Lifetime Memberships	DATE REVISED 10/7/2007

G. The following deceased individuals had Lifetime Membership bestowed upon them:


Mr. E. W. (Red) Burnette
Mr. John Daniluk
Mr. Palmer Freeman
Colonel Marcus Griffin
Mr. Leo Kerford
Ms. Terri Ward

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 111.3 AREA Bestowed Memberships
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Recognition of Retirees	DATE REVISED 06/18/92

All members of SCASFAA who are retiring from the financial aid profession and do not qualify for honorary or lifetime membership will be recognized formally with a Certificate of Appreciation and a letter from the President of SCASFAA. The Certificate of Appreciation and letter should be presented at the annual spring meeting or mailed if the member is not present.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 112.1 AREA Communications -- Newsletter
	Policies & Procedures	DATE APPROVED 07/17/84 DATE REVISED 06/23/08
	Subject: Newsletter Procedures	

1. The official information dissemination medium of the Association shall be its Newsletter. All expenses incurred by printing and distributing the Newsletter shall be defrayed by the Association. The Newsletter shall be used to publish notices of official Association business to be undertaken at all business meetings that require advance notice as set forth in the By-Laws.
2. The official name of SCASFAA's newsletter shall be "Palmetto Pages."
3. The Newsletter shall be published regularly each year. The dates of such publication shall be set by the Newsletter Editor in consultation with the President.
4. The Newsletter Editor shall notify all members of the Executive Board and all committee chairpersons of the submission deadlines and distribution dates for publication of the Newsletter as soon after the beginning of the new year as possible. This schedule shall also be published in the first issue of the Newsletter each year.
5. The Newsletter Editor shall be responsible for adhering to the established schedule and shall not change deadlines or delay publication of the Newsletter without approval of the President.
6. Advertising rates for the newsletter are included in the annual sponsorship assessment. Advertisement size, shape, frequency and placement shall be at the discretion of the Newsletter Editor in consultation with the Sponsorship Chair.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 112.2 AREA Electronic Services – Web Manager
	Policies & Procedures	DATE APPROVED 01/29/99 DATE REVISED 06/28/02
	Subject: Web Site Procedures	


A SCASFAA web site shall be developed and maintained on the world wide web in order to provide a web-based platform to support the mission and goals of SCASFAA. The current website was developed in cooperation with, and is currently maintained by, ATAC Corporation.

1. Access


- A. Access to the general SCASFAA web site shall be provided to all interested persons whether or not they are SCASFAA members. Specific sections of the site available only to SCASFAA members include the following:
1. Membership Directory Search
 2. Membership Directory Print Services
 3. Listserv
 4. Administrative Services
- B. The Executive Board may approve the limitations of access to any or all parts of the web site.

2. Functionalities and Content


- A. Content shall be appropriate and in keeping with SCASFAA's mission and goals.
- B. Content shall include, but is not limited to:
1. Names, addresses, phone numbers and e-mail addresses for the Executive Board and Committee Chairs
 2. Annual Reports and meeting minutes, where appropriate
 3. Articles of Incorporation
 4. By-Laws
 5. Policies and Procedures
 6. Calendars of training activities, conferences, workshops
 7. Long Range Plan and updates
 8. Membership database
 9. SCASFAA Newsletters
 10. Conference Information and Online Registration Form
 11. Position papers/Legislative updates
 12. High School Guidance Counselor Resources
 13. Training/Professional Development Information

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 112.2 AREA Electronic Services – Web Manager
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14. Listserv functionalities
 15. Peer Support Network Information
 16. Online Sponsorship Form
 17. Executive Board/Committee Chair administrative functions
 18. Payment/Finance administrative functions
 19. Event Management administrative functions
3. **Posting Material**
Material to be posted to the website should be provided to the Electronic Services Committee Chair. The Electronic Services Committee Chair will ensure that the provided material meets ATAC requirements for posting, and will forward that material to ATAC for posting to the SCASFAA website.
 4. **Advertising/Sponsorship**
The website will support banner advertising and houses the online sponsorship form as well as the online SCASFAA newsletters, which may contain advertisements as well.
 5. **Site Location and Maintenance**
 - A. The site will be housed on web servers maintained by ATAC Corporation, with the exception of the Pictorial History section, which will continue to be housed at <http://virtual.clemson.edu/groups/SCASFAA/Pictures/photos.htm>
 - B. All website maintenance will be performed by ATAC Corporation in cooperation with the Electronic Services Chair.
 6. **Current Location**
The SCASFAA web site URL is <http://www.scasfaa.org>

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 113.1 AREA Program
	Policies & Procedures	DATE APPROVED 07/01/97
	Subject: Procedures	DATE REVISED 07/01/97

1. The President shall appoint a Program Chairperson who will be responsible for the planning and dissemination of information of the annual fall and spring conferences.
2. The Program Chairperson shall be a member of the Executive Board and shall appoint a committee to assist with the planning of the conferences. The Committee has traditionally included the President, Treasurer, and Vendor/Sponsor Chairperson.
3. Conference sites are chosen in advance by the Site Selection Committee and approved by the Executive Board. The Program Chairperson shall contact the designated hotel or resort as soon as possible to establish a contact and obtain copies of negotiated contracts.
4. A budget, established by the Budget Committee, which includes conference registration fees, shall be provided to the Chairperson by the Treasurer.
5. In establishing a program for the conference, the Conference Checklist may be followed. The Checklist is not all-inclusive since some items may or may not be applicable to the planned conference.
6. Conference Checklist
 - A. Establish a committee meeting schedule
 - B. Obtain budget and establish fees
 - C. Working with the President, establish a conference theme
 - D. Notify membership of conference plans
 1. Submit articles to Palmetto Pages
 2. Conference pre-registration mail out
 - a. cover letter
 - b. hotel reservation form
 - c. conference pre-registration form
 - d. miscellaneous information

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- E. Establish Program Outline
1. Session topics
 2. Obtain Speakers
 3. Obtain moderators (use candidates for spring conference)
 4. Request Federal participants
 5. Obtain session description forms
 6. Work with Vendor/Sponsor Chairperson
- F. Establish Meal Functions
1. Breaks
 2. Executive Board
 3. Breakfasts (continental and buffet)
 4. Luncheon(s)
 5. Banquet
 6. Reception(s)
 7. Nominations/Elections Committee lunch (spring)
 8. Anticipated numbers and menus to hotel
 9. Meal tickets
- G. Program Printing
1. Include conference agenda
 2. Patrons/Sponsors/Contributors/Friends
 3. Executive Board & Program Committee
 4. Maps
 5. Other information necessary to the conference
- H. On-Site Registration
1. Establish place and time to stuff packets to include:
 - a. Program
 - b. Minutes of last Business Meeting (from Secretary)
 - c. Proposed Budget - Fall (from Treasurer)
Budget to Date - Spring (from Treasurer)
 - d. Nominations Form - Fall
 - e. Volunteer Form - Spring
 - f. Evaluation
 - g. Other information pertinent to the Conference

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2. Nametags and Ribbons

I. Miscellaneous


1. Recognize first-time attendees
2. Signs - Session Title and "Sponsored By"
3. VIP transportation
4. VIP gifts
5. Entertainment
6. Work with Vendor/Sponsor Chairperson on Vendor Displays
7. Lab(s)
8. Dress Code
9. Folders for packets
10. Tourist stuff
11. Set-up times
12. Sessions evaluations
13. Flowers
14. Table decorations
15. Invite SASFAA/NASFAA representatives
16. Plan Vendor Reception with Vendor/Sponsor Chairperson
17. Beverage tickets
18. Place cards
19. Free weekend giveaway (Spring)
20. Dance/DJ/Decorations
21. Olympics or other mixer
22. Prizes
23. T-shirts
24. Voting Polls and signs
25. Arrange/coordinate Audio Visual (A/V) equipment
26. Recognition of Retirees
27. Thank you notes

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28. President's caricature (Artist: John Burns, Assistant Athletic Director, Furman University)
29. Order plaques for Executive Board Officers
 - a. President
 - b. President-Elect
 - c. Vice President
 - d. Secretary
 - e. Treasurer
 - f. Member-at-Large
 - g. Past President
 - h. Treasurer-Elect

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 113.2 AREA Program
	Policies & Procedures	DATE APPROVED 02/27/97
	Subject: Local Arrangements	DATE REVISED 02/27/97


1. The Chairperson of the Program Committee or those designated by the chairperson shall be responsible for local arrangements with the meeting facility.
2. Local arrangements will include, but are not limited to, meeting space, break-out rooms, food and beverage service, blocking of and reservation process for sleeping rooms, audio visual equipment and transportation of guests and visitors to and from the facility as appropriate.
3. The Chairperson of the Committee or designee shall agree with vendors and sponsors on services or support to be provided by such vendors and sponsors, but all specific arrangements for such service or support which must be made with the meeting facility shall be the responsibility of the vendors and sponsors, not of the Association.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.1 AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84 DATE REVISED 02/27/97
	Subject: Standing Committees	


1. The Association shall have a minimum of Standing Committees as determined necessary by the Executive Board. Such Standing Committees shall be directly essential to the organizational existence of the Association and be required for adherence to the Articles of Incorporation and By-laws.

2. The following committees have been determined essential to the organizational existence of the Association and have been designated as "Standing Committees." The Goals of those committees are established in Section 114.0 of these Policies and Procedures.

Budget Committee
By-laws Committee
Membership Committee
Nominations and Elections Committee
Program Committee
Professional Development Committee
Legislative Relations Committee
Long Range Planning Committee


	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2 AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84 DATE REVISED 06/18/92
	Subject: Committee Goals	

In addition to the activities of the Executive Board, major responsibility for the planning and undertaking of the activities of the Association is housed with its various committees, both standing and non-standing. Such committees are appointed by the President with the concurrence of the Executive Board, and are responsible for carrying out such goals as are required by the By-laws, these Policies and Procedures, or others as may be established by the President on an annual basis.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-A AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84 DATE REVISED 02/27/97
	Subject: Budget Committee - Goals	


The Budget Committee is a Standing Committee.

1. Review and evaluate the fiscal policies and practices of the Association.
2. Make recommendations concerning the fiscal matters of the Association to the Executive Board.
3. Insure the budgetary health and well being of the Association.
4. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and material to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-B AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: By-Laws Committee - Goals	DATE REVISED 02/27/97


The By-Laws Committee is a Standing Committee.

1. Insure that the Association operates in compliance with its approved By-Laws.
2. Review and make recommendations concerning revision of the Association By-Laws and Executive Board Policies and Procedures Manual to the Executive Board.
3. Inform the membership of the right to present topics or concerns to the Executive Board by requesting that he/she be placed on the agenda of the next scheduled Executive Board Meeting.
4. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and material to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-C AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84 DATE REVISED 02/27/97
	Subject: Consumer Relations Committee - Goals	


The Consumer Relations Committee is a Non-Standing Committee.

1. Develop and disseminate information concerning financial aid opportunities as well as financial planning to as wide an audience as possible through use of available media.
2. Coordinate with other Association committees to insure that all pertinent information, concerning their activities that affect the public, is made available through appropriate media.
3. Recommend to the President and Executive Board means for enhancing the availability of financial aid information to consumers.
4. Actively solicit involvement by members of the financial aid community.
5. Develop specific annual objectives to be undertaken by the committee.
6. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and material to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-D AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84 DATE REVISED 02/27/97
	Subject: Counselor Relations Committee - Goals	


The Counselor Relations Committee is a Non-Standing Committee.

1. Provide assistance, as appropriate, to secondary schools in scheduling, coordinating, and conducting financial aid workshops for parents and students.
2. Seek input from secondary school counselors and personnel concerning financial aid information and training needs.
3. Provide financial aid information and training to secondary school counselors and personnel.
4. Recommend to the President and Executive Board ways in which the Association can better work to meet the needs of secondary counselors in the state.
5. Actively solicit involvement by members of the financial aid community.
6. Develop specific annual objectives to be undertaken by the committee as appropriate.
7. Provide support and assistance to the current SCASFAA team.
8. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and material to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-E AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84 DATE REVISED 02/27/97
	Subject: Legislative Relations Committee - Goals	


The Legislative Relations Committee is a Standing Committee.

1. Keep abreast of activities of the U.S. Department of Education, including development and changes of regulatory policies, procedures, and administrative requirements.
2. Keep abreast of legislative developments on both the national and state levels.
3. Advise the Executive Board of important developments on both the national and state levels.
4. Develop and recommend to the President comments on important issues that should be expressed on behalf of the Association.
5. Provide the membership with timely information via the Association newsletter or other means concerning legislative, regulatory, and administrative developments that affect the management of financial aid programs.
6. Actively solicit involvement by members of the financial aid community.
7. Develop specific annual objectives to be undertaken by the committee as appropriate.
8. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and material to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-F AREA Committees
	Policies & Procedures	DATE APPROVED 07/25/88 DATE REVISED 07/01/01
	Subject: Long Range Planning Committee - Goals	


The Long-Range Planning Committee is a Standing Committee.

1. The Chairperson of the Long Range Planning Committee shall be the immediate Past President.
2. Identify strengths of the Association and recommend actions or directions to the Executive Board that will enhance these strengths.
3. Identify any weaknesses in the Association and recommend actions or directions to the Executive Board that will promote accomplishment of the goals set forth in this manual for the Association.
4. Develop specific annual objectives for presentation to the Executive Board as may be appropriate for the enhancement of the Association in its efforts to promote professional development of its membership and support the existence of viable financial aid programs for education.
5. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and material to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-G AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Membership Committee - Goals	DATE REVISED 02/27/97


The Membership Committee is a Standing Committee.

1. Actively solicit membership in the Association from eligible individuals involved in the administration of financial aid.
2. Maintain a current membership roster.
3. Annually publish and distribute a directory of members.
4. Recommend to the President and Executive Board ways to increase membership in the Association.
5. Maintain an effective communications network as a means of providing vital financial aid related information to participating members in a timely fashion.
6. Actively solicit involvement by members of the financial aid community.
7. Develop specific annual objectives to be undertaken by the committee as appropriate.
8. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and material to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-H AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84 DATE REVISED 06/19/03
	Subject: Newsletter Committee - Goals	


The Newsletter Committee is a Non-Standing Committee.

1. Oversee the publishing of the Association newsletter on a regular basis.
 - a. In coordination with the Association President, the Chairperson selects a newsletter editor responsible for the editing, publishing and distribution of the Association's newsletter.
 - b. In coordination with the newsletter editor, establish newsletter publication and distribution deadlines and communicate these deadlines to all interested parties.
 - c. Promote the use of the newsletter for communication to the membership of all Association activities including reports of activities by all other Association committees.
 - d. Work with the newsletter editor to improve the professional quality of the newsletter by commissioning and/or printing articles on financial aid management, technology, and research.
2. Develop specific annual objectives to be undertaken by the committee as appropriate.
3. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and materials to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives.


	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-1 AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Web Manager - Goals	DATE REVISED 10/07/07

The Electronic Services Committee is a Non-Standing Committee.

1. Provide guidance for the development, maintenance and enhancement of the SCASFAA web site.
2. Promote the use of the web site for communication to the membership of important Association information and all Association activities.
3. Encourage development and utilization of cost-efficient, timely means of communications, including the web, list serves and e-mail by the Board, committees and the membership.
4. Evaluate, on a periodic basis, software options and make recommendations to the Board about the purchase of software and computer equipment that will enhance and facilitate communication and transmission of data between the treasurer and member-at-large and within and between committees.
5. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and materials to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives.


	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-J AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: ListServ Committee - Goals	DATE REVISED 06/19/03

1. Coordinate the Association's use of the SCASFA-L ListServ.
 - a. The Chairperson serves as a liaison between the Executive Board and the owner/manager of the SCASFA-L ListServ.
 - b. Promote the use of the SCASFA-L ListServ for communication to the membership of important and timely Association information.
 - c. Understand proper ListServ protocol and be able to answer members' questions about use of the ListServ.
2. Develop specific annual objectives to be undertaken by the committee as appropriate.
3. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and materials to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-K AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Nominations & Elections Committee - Goals	DATE REVISED 02/27/97


The Nominations and Elections Committee is a Standing Committee.

1. Conduct the nomination process for Association offices in accordance with the Association's policies and procedures for nomination of officers.
2. Conduct the election process for Association offices in accordance with the Association's policies and procedures for election of officers.
3. Recommend to the President and Executive Board revisions or additions to the Association's policies and procedures on nomination and election of officers.
4. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and material to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-L AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Professional Development Committee - Goals	DATE REVISED 02/27/97


The Professional Development Committee is a Standing Committee.

1. Monitor and coordinate professional training activities on the state level.
2. Monitor professional training activities offered regionally or nationally and, to the extent possible, coordinate such efforts if they are to be offered within the state.
3. Develop and make available to financial aid personnel professional training resources, such as workshops, consulting services, and self-instructional materials.
4. Coordinate with the Program Committee to prevent duplication of effort and to insure that all training activities are complimentary.
5. Recommend to the President and Executive Board ways of enhancing the professional development and training activities offered to the membership.
6. Actively solicit involvement by members of the financial aid community.
7. Develop specific annual objectives to be undertaken by the committee as appropriate.
8. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and material to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-M AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Program Committee - Goals	DATE REVISED 02/27/97


The Program Committee is a Standing Committee.

1. Develop a worthwhile program of professional activity for the Association's Fall and Spring meetings.
2. Identify and arrange for participation of speakers, resource individuals and federal representatives at the Fall and Spring meetings.
3. Advise the membership of planned program activities at upcoming Fall and Spring meetings.
4. Make local arrangements for the Fall and Spring meetings in accordance with Association policy and procedure on local arrangements.
5. Recommend to the President and Executive Board revisions or additions to the Association's policy and procedures on local arrangements.
6. Actively solicit involvement by members of the financial aid community.
7. Develop specific annual objectives to be undertaken by the Committee as appropriate.
8. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and material to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-N AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Site Selection Committee - Goals	DATE REVISED 02/27/97


The Site Selection Committee is a Non-Standing Committee.

1. Determine sites for the Fall and Spring meetings in accordance with Association policy and procedure on site selection.
2. Recommend to the President and Executive Board revisions or additions to the Association's policy and procedures on local arrangements.
3. Actively solicit involvement by members of the financial aid community.
4. Develop specific annual objectives to be undertaken by the Committee as appropriate.
5. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and material to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-O AREA Committees
	Policies & Procedures	DATE APPROVED 07/25/88
	Subject: Special Projects Committee - Goals	DATE REVISED 02/27/97


The Special Projects Committee is a Non-Standing Committee.

1. Develop and recommend projects that will meet specific goals of the current president of the Association which do not fall under existing committees.
2. Identify specific objectives for presentation to the Executive Board to meet goals established by the current president.
3. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and material to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-P AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Research Committee - Goals	DATE REVISED 02/27/97


The Research Committee is a Non-Standing Committee.

1. Identify, conduct and share research on issues relative to the financial aid profession.
2. Gather relevant research projects and materials from all possible sources. Material to be housed in the SCASFAA professional library collection.
3. Coordinate research related activities with appropriate national, regional, and state associations.
4. Develop specific annual objectives to be undertaken by the committee.
5. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and material to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-Q AREA Committees
	Policies & Procedures	DATE APPROVED 07/25/88
	Subject: Sponsorship Committee - Goals	DATE REVISED 06/23/08


The Sponsorship Committee is a Non-Standing Committee.

1. Obtain monetary support from current vendors and sponsors as well as recruit additional contributors to SCASFAA's activities.
2. Establish procedures that will result in efficient coordination between the activities of this Committee, SCASFAA's treasurer, other SCASFAA representatives and the vendors/sponsors.
3. Seek revenue to support publication of the newsletter through advertising or other appropriate means.
4. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and material to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-R AREA Committees
	Policies & Procedures	DATE APPROVED 10/21/98
	Subject: Diversity Committee - Goals	DATE REVISED 10/26/05


The Diversity Committee is a Non-Standing Committee.

1. Provide sensitivity training to the SCASFAA leadership and members, as it relates to each other, the community, and the students we serve.
2. Develop activities that support the recruitment and retention of under represented members.
3. Actively solicit the involvement of leadership development of under represented members.
4. Develop programming to further educate the SCASFAA community on diversity issues.
5. Provide support and assistance to the current SCASFAA team.
6. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and material to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-S AREA Committees
	Policies & Procedures	DATE APPROVED June 25, 2007
	Subject: Advisory Committee to CHE	DATE REVISED 10/07/07

The Advisory Committee to CHE is a Non-Standing Committee.

1. This committee will represent the various colleges and universities within SCASFAA.
2. To work closely with CHE regarding proposed guidelines and/or regulations offered by CHE.
3. To advise the constituency of pending issues relating to the administration of aid through CHE.
4. To advise the SCASFAA Board of updates and issues.
5. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and materials to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-T AREA Committees
	Policies & Procedures	DATE APPROVED June 25, 2007
	Subject: Peer Support Network - Goals	DATE REVISED 10/07/07

The Peer Support Network Committee is a Non-Standing Committee.

1. This committee will provide a structured professional assistance directory which facilitates opportunities for SCASFAA members and related professionals to seek assistance and direction.
2. The site will be reviewed annually to ensure that topics and volunteer information are current.
3. Upon completion of his/her term in office, the committee chairperson shall forward one set of all appropriate records and materials to the incoming chairperson and one set to the Secretary of the Association for addition to the Association Archives.