



South Carolina Association of
Student Financial Aid Administrators

SOUTH CAROLINA
ASSOCIATION OF STUDENT
FINANCIAL AID
ADMINISTRATORS

POLICIES & PROCEDURES
MANUAL


Last revised July 1, 2019

SCASFAA is a community of professionals promoting the advancement of financial assistance programs as an essential part of student access to post-secondary education. In a collaborative effort, SCASFAA provides personal and professional development opportunities that embrace sound principles, practices, and ethics of aid administration. SCASFAA develops future leaders by actively involving all members in an environment of mutual respect, cooperation, and support.

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	Policies & Procedures	DATE APPROVED 07/14/84
	Subject: Code of Practices	DATE REVISED 03/29/16


STATEMENT OF ETHICAL BEHAVIOR AND CODE OF PRACTICES

As the South Carolina Association of Student Financial Aid Administrators (SCASFAA) enters into its second 50 years, it is appropriate to note how the general perception of financial aid administrators (association members) has changed. In 1966, these individuals were *charged with the job* of administering student financial aid on a campus. Today, aid administrators are *recognized professionals within a career field* that encompasses responsibilities which extend not only across campuses and but also throughout the domain of higher education. In order to ensure upholding the commitments and the level of professionalism believed required to maintain this status, SCASFAA charges its membership with adhering to the following **Statement of Ethical Behavior** and employing the standards and values put forth in its **Code of Practices**.

Code of Practices


In order to maintain an appropriate and responsible level of professional recognition, SCASFAA members are expected to commit to:

1. Including one or more of the following in the mission or goal of every financial aid program or initiative they undertake: increasing access to higher education, simplifying student aid systems and/or processes, and/or minimizing educationally related indebtedness.
2. Striving, through efforts to advocate for students' best interests and remove the financial barriers they face, to provide both access and choice to those seeking postsecondary educational opportunities.
3. Giving primary emphasis to policies and procedures, presented as simply and concisely as possible, which support meeting the financial needs of low-income, underrepresented, and underserved students through the awarding of grants, student employment, loans, and scholarships.
4. Striving to provide, in the manner deemed best for educating and enhancing the ability to make well-informed decisions, thorough, transparent, and clear information about

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financial aid opportunities, application requirements, eligibility, awarding, and disbursement.

5. Striving to demonstrate consistency in the development of policies, procedures, and administrative practices while following principles that do not discriminate or reflect any bias.
6. Striving to accentuate the responsible management of educational expenses and debt as a part of providing financial education for students and families.
7. Ensuring that the privacy of all written and spoken records pertaining to individual students and their families be maintained and that dealings related to students' needs remain confidential and uncompromised by the interests and demands of others.
8. Striving to earn and maintain the trust and confidence associated with the professional administration of financial aid by always dealing with others honestly, fairly, and with the intent of completing every commitment made.
9. Fostering and respecting the diverse viewpoints of others within the profession by promoting the free expression of ideas and opinions.
10. Striving to support actions and recommendations with research and data analysis whenever possible.
11. Striving to ensure that all financial aid related consumer information is not only provided, but easily found and identified.
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	DATE APPROVED 11/05/2006 DATE REVISED 03/29/16
	Subject: Statement of Ethical Behavior	

Statement of Ethical Behavior

All SCASFAA members are expected to maintain the highest level of ethical behavior and to refrain from any conflict of interest or perception thereof. SCASFAA members and parties affiliated with the Association are required to maintain the highest level of professionalism and to reflect a commitment to maintaining responsible and compliant financial aid administration, providing the highest quality of service to all individuals and constituencies requesting their assistance, being good stewards of the funding for which they have oversight, and upholding and promoting the purpose and goals of the Association. The Association Executive Board reserves the right to refuse or cancel any membership and/or to refuse vendor or exhibitor support if it is deemed that the highest level of professionalism and commitment to these standards is being breached or threatened.


	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER General 2 AREA General DATE APPROVED 07/14/84 DATE REVISED 02/20/15
	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 Tuition Grants Commission office 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.
 - D. Starting in 2014, SCASF AA will utilize electronic means to archive records. These will include Board reports, Board minutes, End of year reports, and other documents as determined by the SCASF AA Board.

These records will be able to be accessed on the SCASF AA website (currently through Wild Apricot). Also, the records will be downloaded to an electronic storage medium (ex. Flashdrive, CD, DVD, external hard drive, etc.) to be kept at the designated archival site approved by the SCASF AA board. (currently SC Tuition Grants Commission) and copied from older storage mediums to newer storage mediums every 5 years.


	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER General 3 AREA General DATE APPROVED 07/07/87 DATE REVISED 7/1/19
	Policies & Procedures	
	Subject: Permanent Address	

1. In accordance with Executive Board action on March 29, 2019, the permanent address of the South Carolina Association of Student Financial Aid Administrators shall be the current address of the SC Higher Education Tuition Grants Commission, with authority given to the Secretary to update the below address as needed, until further action is taken by the Executive Board.
2. The current permanent address is:
 - c/o SC Higher Education Tuition Grants Commission
 - 111 Executive Center Drive, Suite 242
 - Columbia, SC 29210

	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 3/29/19

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 to the President of the Association, no later than 30 days prior to the Annual Business Meeting.
 - 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.

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- E. The following have been recognized as Fearless Nine Service to SCASFAA Awardees:
- 2008: Marvin Carmichael
 - 2009: Robert Godfrey
 - 2010: Betty Whalen
 - 2011: Earl Mayo
 - 2012: Elizabeth Milam
 - 2013: Ellen Green
 - 2014: Nancy Tate
 - 2015: Ed Miller
 - 2016: Dr. Tabatha McAllister
 - 2017: Jeff Dennis
 - 2018: Mike Fox
 - 2019: Keith Reeves
- 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 to the President of the Association, no later than 30 days prior to the Annual Business Meeting.
- 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.

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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.
- E. The following have been recognized as SCASFAA Emerging Leader Awardees:
 - 2008: Missy Lutz Perry
 - 2009: N/A
 - 2010: Katie Harrison
 - 2011: Rosalind Stevenson Elliott
 - 2012: Donna Quick
 - 2013: Kevin Delp
 - 2014: Ken Bernard
 - 2015: April Baur
 - 2016: Kyle Phillips
 - 2017: Carla Brewer
 - 2018: Zachary Christian
 - 2019: JW Kellam
- 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. SCASFAA Achiever Award

- A. The Executive Board shall be charged to consider nominees for the SCASFAA Achiever Award. Nominations may be made in writing by

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any current member of SCASFAA and must be submitted annually to the President of the Association, no later than 30 days prior to the Annual Business Meeting.

- B. Individuals nominated for the SCASFAA Achiever 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. 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.

- E. The following have been recognized as SCASFAA Achiever Awardees:

2011: Violette Hunter
2012: Jeff Dennis
2013: Nancy Tate
2014: Kevin Perry
2015: Jennifer Williams
2016: Katie Harrison
2017: Cindy Peachey
2018: Elizabeth "Biz" Daniel
2019: Melanie Gillespie

- F. A plaque inscribed with the following verbiage shall be utilized for the SCASFAA Achiever Award:

*SCASFAA Achiever Award
Presented to
Name of Recipient
in Recognition of Outstanding Contributions
as a contributing member of the South Carolina
Association of Student Financial Aid Administrators
Date*

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	Subject: Awards and Recognition	DATE REVISED 3/29/19

4. 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.
- 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
Mr. Chip Limehouse	2012
Mr. John Courson	2012
Mr. Justin Draeger	2014
Ms. Gilda Cobb-Hunter	2017
Ms. Cheryl Hughes	2019

- 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*

5. 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.
- 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

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Gerald Long
 Sheryll Marshall
 Susan McCrackin
 Eugena Miles
 Janice Noffz
 Susan Purvis
 Janie Reid
 Gary Rose
 Edward Shannon, III
 Glenn Shumpert
 Judy Smith
 Bill Whitlock

2009 Recipient is as follows:
 Robert Godfrey

2011 Recipients are as follows:
 Peggy Collins
 Meg Hurt
 Earl Mayo

2012 Recipient is as follows:
 Keith Reeves

2013 Recipient is as follows:
 Elizabeth Milam

2014 Recipients are as follows:
 Nancy Tate
 Kay Walton

2015 Recipients are as follows:
 Linda Dawson
 Vivian Gaylord
 Fred Hardin
 Violette Hunter
 Robert Kersey
 Theresa Reed

Deborah Williams

2016 Recipients are as follows:

Angela Fowler
Hank Fuller
Sandra Gibson
Bobby Holcombe
Michael Jordan
Terri Williams

2017 Recipients are as follows:


Sheryl Marshall
Tabitha McAllister
Cindy Peachey

2018 Recipients are as follows:

Elizabeth "Biz" Daniel
Carolyn Sparks
Brenda Leontuk
Kim Jenerette

2019 Recipients are as follows:

Julie Hadwin
Lillian Sims
Karen Woodfaulk
Susan Thompson
Betty Williams

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	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Awards and Recognition	DATE REVISED 3/29/19

6. 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*

7. 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 SCASFEEA in accordance with SCASFEEA 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).
3. 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 DATE REVISED 06/28/02
	Subject: NASFAA Annual Conference	


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.

	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 10/7/13

1. 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 annual meeting. See also P&P 105A.1 #8.
2. The President has the authority to exceed any budget line item by 10% over the Treasurer's authority.
3. Any expenditure exceeding the President's authority must be approved by the Executive Board.
4. 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 DATE REVISED 06/20/14
	Subject: Responsibilities	

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.
6. The Association President-Elect is responsible for coordinating the annual transitional board meeting during the year in which s/he will be transitioning to President.
7. Shall bear primary responsibility for the oversight of the Long-Range Plan.

	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 06/30/17


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 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 annual 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 prior to the close of the current fiscal year.


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	Policies & Procedures	DATE APPROVED April 23, 2006
	Subject: Student Success Scholarship	DATE REVISED 03/22/12

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 annual 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 annual conference and through other means of communication (i.e., blog, social media).

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 103.1 AREA Secretary
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Responsibilities	DATE REVISED 03/22/12

1. Prepare minutes of Executive Board meetings and Association Business meetings and distribute copies of these minutes at subsequent meetings.
2. 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
3. Maintain a current Policies and Procedures Manual and assist in the typing and distribution of revisions.
4. Assist in formatting of Annual Reports and archiving of Association records.
5. 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.
6. 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 105A.1 AREA Treasurer
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Responsibilities	DATE REVISED 6/07/16

1. Bonding:

In accordance with the by-laws, fidelity bonding will be secured by the Treasurer to cover any individual having direct access to the Association's funds. The bond provides for a single loss limit of \$250,000. See also GFM 4.3.

2. Receipt/Disbursement of Funds:

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

3. Accounting:


In accordance with the by-laws, the Treasurer of the Association will be responsible for verifying the appropriate recording of receipts of monies received by the Treasurer-Elect.

4. Quarterly Financial Reviews:

The Treasurer will work with the Treasurer-Elect to perform a quarterly financial review to assist with reconciliation of accounts on an ongoing basis.

5. Financial Reports:

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

	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 6/07/16

6. 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, Treasurer and Treasurer-Elect, with only one signature required. Approval of both the Treasurer and President is required for any check written in excess of \$5,000.

7. 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.

8. 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 annual meeting. The Treasurer has the authority to pay full bills for the meetings as approved by the program chairperson. See also P&P 101.3.

9. Sponsor Support Coordinator:

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

10. Taxes:

The Treasurer if unable to complete the tax return himself or herself, will contract with a professional tax-preparer and file required annual taxes for the Association. The Treasurer will ensure that the required IRS documents are prepared and filed by the required deadlines. The Treasurer will assist the Treasurer-Elect in the next fiscal year in completing the required IRS documents from their year of service

	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 6/07/16

11. Budget Committee Chair:

The Treasurer will serve as Chair of the Budget Committee. The committee will consist of the President, President-Elect, the Immediate Past President, the Treasurer-Elect, the Sponsor Chairperson, the Program Chairperson, Financial Planning Chairperson, a past Treasurer and any other members as deemed appropriate by the President. See also GFM 2.1.

12. Contracts:

The Treasurer will attain and maintain a copy of any contract signed by the Association. The Treasurer will audit any bills associated with said contracts to verify there are no discrepancies and if there are will resolve these differences with the appropriate committee chair and the billing agency before such bill will be paid.

13. Invoices:


The Treasurer will invoice any individual or agency that owes the Association monies due to a contract, membership or other such legal agreement.

14. Investments:

The Treasurer and the Financial Planning Chairperson will work together to maintain and manage all investments for the Association. Decisions regarding changes in investments will be voted upon by the Budget Committee. The Budget Committee will develop both a short-term and long-term investment plan.

15. Treasurer-Elect:

The Treasurer will be responsible for training the Treasurer-Elect on the various duties they performed during their year as Treasurer-Elect. The Treasurer will be responsible for verifying that the responsibilities of the Treasurer-Elect are performed timely and accurately, and in such cases that they are not will make any necessary corrections.

	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 6/07/16


16. Annual Conference:

The Treasurer will assist in the Annual Conference with the following duties. The Treasurer will produce registration materials for the Annual Conference to include, but not limited to, name-tags, coupons, and a statement of the annual budget. The Treasurer will assist the Treasurer-Elect in the processing of registration dues at the Annual Conference. The Treasurer will make appropriate disbursements required during the Annual Conference.

17. Financial Review:

The Treasurer will be available for a final financial review, as scheduled by the Association President, to respond to appropriate requests for information and to provide a written response to the final financial review report. The Treasurer will share the results of this financial review with the new incoming Treasurer to assist in developing any necessary changes in policy to prevent such errors, if any, from occurring again.

18. The Treasurer will file licensing agreements and ensure reporting and payment, if applicable, to ASCAP and BMI. See also GFM 4.2.1.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 105B.1 AREA Treasurer-Elect
	Policies & Procedures	DATE APPROVED 10/07/07
	Subject: Responsibilities	DATE REVISED 9/21/15

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. Receipt of Funds:


In accordance with the by-laws, the Treasurer-Elect of the Association will be responsible for receiving, receipting and depositing into the Association bank account, all monies of the Association, and for keeping adequate and appropriate records of such receipts. This will include registration fees for events and membership dues. The Treasurer-Elect will keep financial records up-to-date by posting deposits in Quickbooks online.

4. Quarterly Financial Reviews:

The Treasurer-Elect will work with the Treasurer to perform a quarterly financial review to assist with reconciliation of accounts on an ongoing basis.

5. Budget Committee:

The Treasurer-Elect will serve as a member of the Budget Committee.


	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 105B.1 AREA Treasurer-Elect
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Responsibilities	DATE REVISED 9/21/15

6. Membership Dues:


The Treasurer-Elect will be responsible for processing all Membership Dues, updating membership payment status for said members, and reporting this information to the Member-at-Large weekly

7. Event Registration Dues:

The Treasurer-Elect will be responsible for processing registrations for all events where attendance requires a fee, such as the Annual Conference and Professional Development Opportunities. In such an event that the Treasurer-Elect cannot be present, the Treasurer shall serve this duty, and if that is not possible they shall request a member of the Budget Committee perform the function. Travel expenses to all such events, except the Annual Conference, will be borne by the Association and include travel, lodging, meals and miscellaneous expenses, in accordance with 107.6. Travel expenses for the Annual Conference will only include travel and meals on the days of registration and will not include lodging.

	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 6/07/16

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>
003	Contingency/Transfer of Assets
005	Other Income
007	Charity Income
020	Membership Dues
030	Fall Conference
040	Spring Conference
050	Professional Development
050.1	New Aid Officers' Workshop
050.5	NASFAA Decentralized
050.7	Other Workshops
070	Sponsorship
80	Interest Income
80.1	Checking
80.2	CD
80.3	Money Market
83	Dividends Earned
83.1	Edward Jones-ST 35/65
83.2	Edward Jones-LT 50/50
83.3	Edward Jones-Money Market
85	Capital Gains
85.1	Edward Jones-ST 35/65
85.2	Edward Jones-LT 50/50
090	Miscellaneous Income

	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 6/07/16


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	Treasurer-Elect
201	Membership Committee
202	Communications
203	Program-Fall Conference
204	Program-Spring Conference
205	Nominations & Elections
206	Legislative Relations
207	Consumer Relations
208	President's Contingency
209	Miscellaneous
213	Professional Development
213.1	New Aid Officers' Workshop
213.3	NASFPA Decentralized
213.5	Other Workshops
215	Counselor Relations
218	Global Issues
221	Long Range Planning
222	Sponsorship
224	Site Selection
225	Special Projects
226	Executive Board
226.1	Transitional Board Meeting
226.2	Board Meetings
227	Insurance & Bonding
228	Electronic Services
229	Scholarship Awards
230	Advisory Committee to CHE
231	Peer Support
232	Prior Administration Expenses
233	Charity


	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 6/07/16

BUDGET CATEGORIES


<u>Budget Code</u>	<u>Category</u>
A	Travel
B	Printing
C	Postage
D	Supplies
E	Food
F	Miscellaneous
G	Honorarium
H	Meeting

	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 10/7/13

A copy of the budget, once approved by the Executive Board, shall be distributed by the Treasurer to the membership via email and/or the website.

	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 6/29/17


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 annual financial review of the Association's financial records shall be conducted by the Financial Planning Committee, as appointed by the President which should include at least one past Treasurer of the Association. 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 Management and the Office of Treasurer.
4. The Financial Planning Committee shall present a report of the financial review to the Executive Board as early in the new fiscal year as possible, but no later than October 1.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 107.5 AREA Fiscal Management
	Policies & Procedures	DATE APPROVED 07/17/84 DATE REVISED 03/05/14
	Subject: SCASFAA Financial Review Guide	

(Assumes use of and access to Wild Apricot and QuickBooks Online)

Items Needed for Annual Review

1. Prior Year Financial Review Report
2. Quarterly Financial Review Reports
3. Prior Year Final Budget vs. Actuals (Profit/Loss Statement)
4. Prior Year Final Balance Sheet
5. Prior Year IRS Form 990
6. Final Budget vs. Actuals (Profit/Loss Statement)
7. Final Balance Sheet
8. Final Sponsor Revenue (Donations) Report
9. Executive Board Minutes (available on the website)
10. Monthly Statements for all Bank Accounts (Checking, Savings and/or Money Market) and Other Current Assets/Investments (Managed Advisory Accounts, CDs, etc.)
11. Final Registration by Type report for each event
12. Final Membership Paid Income report
13. Backup for Income and Expenses to include deposits, travel expense vouchers, mileage reimbursement vouchers, expenditure vouchers and credit card expense forms
14. Employee Theft Policy (aka Director's and Officer's or Crime)
15. General Liability Policy (aka Business Owners)
16. Monthly reconciliations (available in QuickBooks)
17. Policies & Procedures Manual and the Guide to Financial Management & the Office of Treasurer
18. Physical Property Asset List
19. Outstanding Contracts
20. ASCAP and BMI reports (available online)

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 107.5 AREA Fiscal Management
	Policies & Procedures	DATE APPROVED 07/17/84 DATE REVISED 03/05/14
	Subject: SCASFAA Financial Review Guide	

Annual 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.
2. Review Findings and Recommendations from prior year Financial Review to ensure any deficiencies have been addressed and recommendations discussed.
3. Review Quarterly Financial Review reports to ensure any deficiencies have been addressed.

Budget vs. Actuals (Profit/Loss Statement) and Balance Sheet


1. Total of all Assets from Prior Year Balance Sheet
+ Income
- Expenses
= Total of all Assets from Final Balance Sheet

Bank Accounts Statements (Checking, Savings and/or Money Market)

1. Ending Balance of the June 30 Bank Statement
- Outstanding Checks (Debits)
+ Outstanding Deposits (Credits)
= Ending Balance on Final Balance Sheet
2. Verify that the first and last check numbers from the checkbook agree with the bank register in QuickBooks and that all checks are accounted for.
3. All voided checks should be clearly marked and kept with the check stubs. The bank register should be reviewed in QuickBooks to confirm that the checks have been voided. The memo line will indicate "Voided" with an amount of 0.00.

Check	-Split-			
06/18/2013	2501	Bank of America Visa Card	0.00	R
	Check	227F Insurance & Bonding:Miscellaneous	Voided	
06/18/2013	2502	Bank of America Visa Card	447.55	R

4. Review and verify monthly bank account reconciliations in QuickBooks. A reconciliation history and reports can be found under "Banking" and then "Reconcile".

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 107.5 AREA Fiscal Management
	Policies & Procedures	DATE APPROVED 07/17/84 DATE REVISED 03/05/14
	Subject: SCASFAA Financial Review Guide	

Other Current Assets Statements and Investment Percentages

1. Verify that the last statement for each account (managed advisory account, CD, etc.) matches the balance on the Balance Sheet and that interest, dividends and capital gains have been recorded correctly.
2. Review percentage allocation of total assets to the operating fund, short-term investments and long-term investments and make recommendations for any changes needed.
3. Verify reserve fund – short-term and long-term investments are equal to or greater than the most recent operating budget.

Sponsor Income (tracked under Donations in Wild Apricot)

1. Verify that the income reflected on the Budget vs. Actuals report matches the Sponsor Revenue (Donations) Report.
2. Note any outstanding sponsor income.

Deposit (Income) Verification


1. Perform a random check of deposits in QuickBooks and trace the deposit to the bank statement. Several “large” deposits should be reviewed as well as several other random deposits.
2. Using the Final Registration by Type report from Wild Apricot, verify that income matches each respective line on the Budget vs. Actuals report.

Membership Verification

1. Verify from the Membership Paid Income report that revenue matches the income line 020-Membership Dues.
2. Verify Honorary and Lifetime members in Wild Apricot to P&P 111.1 and 111.2.

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 Budget vs. Actuals report and Balance Sheet for the applicable fiscal year.

	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 03/05/14

Vouchers and Forms

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 reimbursement to or charge made by the Treasurer is approved by the President.
4. Verify accuracy of expenses and completeness of documentation for payments or reimbursements to the President or Treasurer.

Travel Expense Vouchers


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

Mileage Reimbursement Vouchers

1. Verify that mileage reimbursements conform to P&P 107.6 #2 (A) and 107.6 #3 and that documentation of mileage is provided.

Credit Card Expense Forms

1. Verify that credit card expenses have been accurately reported on the credit card expense form and have not been paid a second time on a travel expense voucher or an expenditure voucher.
2. Verify use of the credit card has not been to circumvent Policies & Procedures outlined in 107.6 and 107.7.
3. Ensure cardholders have surrendered their cards within 10 days of the expiration of their term of office or at the direction of the President, whichever occurs first.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 107.5 AREA Fiscal Management
	Policies & Procedures	DATE APPROVED 07/17/84 DATE REVISED 03/05/14
	Subject: SCASFAA Financial Review Guide	

Contractual Obligations, Insurance Policies and ASCAP/BMI Reports

1. Verify that the Employee Theft Policy is sufficient for the total assets and make recommendations for any needed adjustments in coverage.
2. Review the coverage for the General Liability Policy and make recommendations for any needed adjustments in coverage.
3. Review potential liability from outstanding contracts.
4. Verify that any contract obligating the Association to \$5,000 or more has been approved by the Executive Board and signed by the President.
5. Verify ASCAP and BMI reports have been filed and applicable payments made.

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


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

Physical Property Asset List

1. Review the prior year physical property 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. Verify who has possession of the equipment.

Member Accounts in Wild Apricot

1. Verify pending (unpaid and partially paid) invoices/registrations have been cancelled for each event.
2. Verify Aging Receivables have been reviewed and updated (should only be unpaid membership invoices at year-end).

	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 03/05/14

Items Needed for Quarterly Review

1. Quarterly Financial Review Reports
2. Prior Year Final Budget vs. Actuals (Profit/Loss Statement)
3. Prior Year Final Balance Sheet
4. YTD Budget vs. Actuals (Profit/Loss Statement)
5. YTD Balance Sheet
6. YTD Sponsor Revenue (Donations) Report (Wild Apricot-Payments & Refunds)
7. Executive Board Minutes (available on the website)
8. Last Monthly Statements of Quarter for all Bank Accounts (Checking, Savings and/or Money Market) and Other Current Assets/Investments (Managed Advisory Accounts, CDs, etc.)
9. Final Registration by Type report for each event closed during the quarter
10. YTD Membership Paid Income report
11. Backup for sample selected in review of travel expense vouchers, mileage reimbursement vouchers, expenditure vouchers and credit card expense forms
12. Monthly reconciliations (available in QuickBooks)
13. ASCAP and BMI reports (available online)


Quarterly Review Procedures

Executive Board Minutes

1. Review Executive Board minutes from previous quarter for any Board action(s) pertaining to the budget including approval of overages and adjustments.
2. Review prior Quarterly Financial Review reports to ensure any deficiencies have been addressed.

Budget vs. Actuals (Profit/Loss Statement) and Balance Sheet

1. Total of all Assets from Prior Year Balance Sheet
+ Income
- Expenses
= Total of all Assets from YTD Balance Sheet

	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 03/05/14

Bank Accounts (Checking, Savings and/or Money Market)

1. Verify that the first and last check numbers from the checkbook agree with the bank register in QuickBooks and that all checks are accounted for.
2. Review and verify monthly bank account reconciliations for the quarter in QuickBooks. A reconciliation history and reports can be found under “Banking” and then “Reconcile”.

Other Current Assets Statements and Investment Percentages

1. Verify that the last month’s statement for each account (managed advisory account, CD, etc.) matches the balance on the Balance Sheet and that interest, dividends and capital gains have been recorded correctly.
2. Review percentage allocation of total assets to the operating fund, short-term investments and long-term investments and make recommendations for any changes needed.

Sponsor Income (tracked under Donations in Wild Apricot)

1. Verify that the income reflected on the YTD Budget vs. Actuals report matches the YTD Sponsor Revenue (Donations) Report.

Deposit (Income) Verification

1. Using the Final Registration by Type report from Wild Apricot, verify that income matches each respective line on the Budget vs. Actuals report for each event that closed during the quarter.


Membership Verification

1. Verify from the YTD Membership Paid Income report that revenue matches the income line 020-Membership Dues.

Vouchers and Forms

Expenditure Vouchers

1. Review expenditures posted in QuickBooks and select a sample and request documentation from the Treasurer to ensure all were paid timely, properly posted and included the appropriate approvals.
2. Consider checks written for \$5,000 or more and expenses and completeness of documentation for payments to or charges made by the President or Treasurer.

	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 03/05/14

Travel Expense Vouchers

1. Review expenditures posted in QuickBooks and select a sample and request documentation from the Treasurer to ensure that travel expenses conform to P&P 101.2, 102.1 and 107.6.

Mileage Reimbursement Vouchers

1. Review expenditures posted in QuickBooks and select a sample and request documentation from the Treasurer to verify that mileage reimbursements conform to P&P 107.6 #2 (A) and 107.6 #3 and that documentation of mileage is provided.

Credit Card Expense Forms


1. Review expenditures posted in QuickBooks and select a sample and request documentation from the Treasurer to verify that credit card expenses have been accurately reported on the credit card expense form and have not been paid a second time on a travel expense voucher or an expenditure voucher.
2. Verify use of the credit card has not been to circumvent Policies & Procedures outlined in 107.6 and 107.7.

Insurance Policies and ASCAP/BMI Reports

1. Verify that the Employee Theft Policy and General Liability Policy are paid in the quarter in which they are due.
2. Verify ASCAP and BMI reports have been filed and applicable payments made during the quarter in which they are due.

Member Accounts in Wild Apricot

1. Verify pending (unpaid and partially paid) invoices/registrations have been cancelled for each event that closed during the quarter.
2. Verify Aging Receivables have been reviewed and updated.

	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 06/30/17

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 of \$0.35 per mile, 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.

	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 06/30/17

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.

	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 06/30/17

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.


2. 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 Annual Conference, Decentralized Training, etc). In addition to the above restrictions, private auto mileage at the rate of \$0.35 per mile 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 03/05/14
	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 consist of affiliate members of the Association who are employed by sponsoring organizations. These affiliate members shall comprise no more than 50% of the Sponsorship Committee. The committee chair shall make the final determination on tier pricing recommendations, which will be presented to the Executive Board for approval.

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 specific sponsorship packages and rates, as approved by the Executive Board, should be recorded in the board meeting minutes and should also be included in the Sponsorship Chair’s archive information.

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	Policies & Procedures	DATE APPROVED 10/01/90 DATE REVISED 03/05/14
	Subject: Sponsorship	

The annual sponsorship rate shall include a combination of the following, depending on the level of sponsorship chosen:


- One exhibition space at the association’s annual conference
 - Exhibition space may be designated as premium or non-premium
- Advertisement on the association’s blog
- Advertisement on the association’s web site
- Advertisement in the association’s annual conference program
- Placement of marketing material (i.e.: flyer or brochure) in each conference attendee’s registration packet
- Opportunity to moderate or present on industry-specific topics at the conference at the request of the conference committee
- Opportunity to attend and/or participate in select professional development training sessions (i.e.: New Aid Officer’s Workshop, Leadership Symposium) at the request of the professional development committee
- Opportunity to submit industry-related articles for the SCASFAA blog
- Opportunity to sponsor and/or present an industry-specific training webinar for SCASFAA members
- Conference registration/attendee listing (consisting of names and email addresses) approximately three weeks prior to the conference, a second listing two weeks prior to the conference and a final listing after the conference

Advertising size, shape and placement shall be at the discretion of the Conference Chair for the conference program, and the Chair of the Electronic Services committee for the blog and web site ads in consultation with the Sponsorship Chair.

V. Policies

a. Advertising

Advertising in the association’s blog, website, and/or annual conference program will be included as part of the annual sponsorship options.

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b. Complimentary Membership and Conference Registrations

There shall be no complimentary membership in the association offered to any sponsor resulting from their sponsorship commitment. Employees of sponsoring organizations will need to follow regular membership application procedures and pay the association's membership fee. This process is provided for on the association's web site. In general, there shall be no complimentary conference registration offered to any sponsor resulting from their sponsorship commitment. Sponsors will need to follow regular conference registration procedures and pay the association's conference registration fee for all organization representatives attending the annual conference. This process is also provided for on the association's web site. In recognition of sponsors who choose to support the association at the top level (tier) of sponsorship, the association may offer a complimentary conference registration for one organization representative attending the annual conference. The chair of the sponsorship committee shall coordinate such complimentary conference registrations with the sponsoring organization's representative, the conference committee chairperson, and the association's President and Treasurer.

c. Door Prizes


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

d. Limitation on Marketing Items during Events

At the annual conference 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.

e. 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

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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.

f. 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.

g. 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 program 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.


h. Right of Refusal

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

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 fiscal year, ideally involving the current Sponsorship Chair and committee and the incoming Sponsorship Chair and committee when possible.

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 to the Sponsorship section of the association's web page.

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	Policies & Procedures	DATE APPROVED 10/01/90
	Subject: Sponsorship	DATE REVISED 03/05/14

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. The sponsorship form will serve as the sponsors invoice, and a copy should be mailed to the Treasurer or Treasurer-Elect as indicated, along with the sponsor's remittance. The Sponsorship Chair will work very closely with the Treasurer or Treasurer-Elect to ensure payment is received in a timely manner.

VII. biting

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.

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
	Subject: Vouchers and Forms	DATE REVISED 6/7/16

Voucher

- Expenditure Voucher
- Mileage Reimbursement Voucher

Forms


- Credit Card Expense Form

	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 10/21/14


Credit cards are secured for the President, President-Elect, Program Chair 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 President and Treasurer will work in conjunction to secure credit cards for official SCASFAA business use by the President, President-Elect, Program Chair 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 credit card expense form, including receipts, a description of all charges made and the expense line to be charged.
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
	Subject: Procedures	DATE REVISED 6/26/13


The primary purpose for Site Selection is to ensure an acceptable and economical site for the annual conference either two years or three years in advance according to presidential direction. (Example: 2012-2013's Site Selection reviewed sites for 2014 and 2015 annual conferences).

1. The president shall appoint a site selection chair or coordinator to review potential sites.
2. The president shall indicate the time frame and the potential locations for the annual conference(s). The President, at his or her discretion, may direct the Site Selection Chairperson/coordinator to evaluate sites for either two years or three years in advance. (If site selection is choosing two conferences for review it is best to have information for the first conference for the fall board meeting and the second conference to be reviewed at the spring board meeting).
3. The chairperson/coordinator shall be a non-voting member of the Executive Board and will attempt to get representation from all sectors on the Site Selection committee.
4. The committee will review potential dates for the conference based on review of holidays, training events and other financial aid associations' conferences.
5. The committee will provide each site with a tentative conference agenda template so that each site can provide appropriate information for consideration. The template should be reviewed by the chair/coordinator and president for any adjustments prior to sending to the respective sites. **Addendum A** will contain the template.
6. The committee shall contact hotels in the cities that are possible locations for future annual conference(s). The committee will request information from each respective site and receive written communication for the sites considered. As appropriate, a site visit will be made to each site to determine feasibility of conference site. The site selection checklist should be used as a guide when

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communicating with the site and requesting information. **Addendum B** will contain the checklist. It is important that the chair determine if additional event insurance is required by the facility.

7. Upon completion of the visitation process, the committee shall compare a site selection comparison chart for review by the Executive Board and a recommendation for a site. **Addendum C** will contain a sample comparison chart.
8. The chairperson/coordinator will bring recommendation(s) from the committee to the Executive Board.
9. The Executive Board will make the final decision. No written agreement or contract with a facility shall be signed on behalf of the Association until the Executive Board reaches a decision. The president will sign the official contract with the facility chosen.
10. It is imperative that any reward points from the facilities be granted to the Association, if possible. If not possible, the points should be granted to the president-elect and be able to reassigned to another board/association member as deemed necessary by SCASFAA. If this is not possible, the committee will request that no reward points be granted for the site chosen.

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**Addendum A – Tentative Conference Agenda
(Example of a Sunday – Wednesday format)**

Sunday

1. Opening Board Meeting – Sunday Morning/Afternoon (meeting space)
2. Lunch for conference committee and board
3. Vendor Set-up
4. Conference Committee meeting (meeting space) if desired
5. Registration tables
6. Possible room if having pre-conference session
7. Opening business meeting (general session)
8. President’s reception of choice
9. Evening activity (if so desired)

Monday

1. Continental or other breakfast
2. Either general session or block of concurrent sessions (3 rooms)
3. Either general session or block of concurrent sessions (3 rooms)
4. Luncheon in meeting space
5. Either general session or block of concurrent sessions (3 rooms)
6. Either general session or block of concurrent sessions (3 rooms)
7. Possible dinner on your own
8. Evening activity

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Tuesday


1. Continental or other breakfast
2. Either general session or block of concurrent sessions (3 rooms)
3. Either general session or block of concurrent sessions (3 rooms)
4. Lunch on your own (if desired)
5. Either general session or block of concurrent sessions (3 rooms)
6. Either general session or block of concurrent sessions (3 rooms)
7. President's reception
8. Awards Banquet
9. Entertainment

Wednesday

1. Plated Breakfast
2. General Session
3. Closing business meeting

Hotel Room block –

70 each night with 2 days prior and 2 days after counting in room block (adjust as needed and provide to hotel) be sure that rooms 2 days before and 2 days after count into the room block.

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Addendum B - Site Selection Checklist

A. Registration and Guest Rooms


1. How many rooms are available?
2. What are the room rates and applicable taxes and service charges?
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. What is room block deadline and at what point are unreserved rooms released?
7. What are the charges for wireless internet access – in guest rooms and meeting space?
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, what is per person cost?
10. What is the cancellation policy for rooms?
11. Dates available at facility (give at least 2 potential dates)

B. Meeting Rooms

1. How many meeting rooms are available?
2. What is cost of meeting room space?
3. What are their maximum room capacities?
4. Are there pillars or obstructions in the room?
5. Is audio-visual equipment readily available? What is A/V policy for hotel?
6. Are there distractions (open windows, outside noise, etc.) in the meeting area?
7. Are there sufficient meeting rooms available to accommodate the number of expected concurrent sessions?

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 and will breaks be held in vendor area?
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?

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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. Hotel Services


1. Is there adequate parking and what is the parking fee?
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?
8. Does the hotel have a shuttle to/from surrounding areas?

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. What is food, beverage minimum and bar fees?
5. How many additional places, above the guarantee, will the hotel set?


G. Accounting

1. How does the hotel handle master billing?
2. Package pricing for audio-visual?
3. Credit requirements?

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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, contractual, and verbal correspondence for association reference.

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Addendum C – Site Selection Comparison
SCASFAA Site Selection Committee 20XX-20XX
20XX Annual Conference


Name/Address of site	Site A	Site B	Site C
Hotel Contact Information			
Basic Site Information			
Meeting Room Dimensions			
Dates available (Easter is ?)			
Meeting Room Fee			
Food and Beverage Minimum			
Service Charges/Taxes/Fees			
Catering Menus			
Bartender Fees/Required Purchases			
Hotel Room Costs and Taxes			
Hotel Minimums/required			
Exchanges/ Complimentary rooms			
Internet			
Vendor			
Parking			
Audio Visual			
Other			

	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 10/02/18

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 Immediate Past-President. If the Immediate Past-President is unable to fulfill these duties, the President shall appoint a substitute Chairperson with the approval of the Executive Board.
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 made available to the membership prior to September 15.
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 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. The slate shall be presented to the Board as a committee recommendation prior to being announced to the general membership


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6. Upon completion of the nominations process, the Chairperson shall forward to the Chairs of the Electronic Services and Communications Committee the slate of candidates and the copy-ready biographical information and statements of candidacy provided by each candidate for distribution to the membership prior to the Annual 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.

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	Policies & Procedures	DATE APPROVED 10/14/93 DATE REVISED 10/02/18
	Subject: Campaign Guidelines	


1. Each candidate will be featured on the website and other appropriate electronic resources prior to the annual 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. Each candidate will be featured on the website and other appropriate electronic resources prior to the election opening. 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.
3. The slate of candidates will be introduced at the initial business meeting of the Annual Conference.
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 available electronically) shall be made by, or on behalf of the candidate prior to, or during the conference.
7. 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 DATE REVISED 10/02/18
	Subject: Procedures	


The slate of candidates will be introduced at the annual conference and the election held the following 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. Prior to the opening of the online poll, the Chairperson of the Nominations and Elections Committee shall give active members the opportunity to submit final nominations for candidates for office. This process serves as nominations from the floor. In the event of floor nominations, biographical information and statements of candidacy must be submitted by the candidate and made available to the membership by the Committee.
2. 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 candidates nominated by active members, (i.e., nominations from the floor).
3. The Chairperson of the Nominations and Elections Committee shall introduce to the membership each individual on the slate of candidates recommended by the Committee and nominated from the floor.
4. Once the nomination process has been completed, the Chairperson of the Nominations and Elections Committee shall announce the availability of online voting for members in addition to the closing time of the online poll. The poll shall close no later than 5:00 p.m. on the day preceding the announcement of the results of the election.

	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 10/02/18


1. All current members of the Association may vote in Association elections.
2. Current members may vote electronically. The format for electronic voting shall be determined by the Chairperson of the Nominations & Elections Committee. Information will be made available via the Association website. The procedures and deadline for voting shall be announced by the Chairperson at the time nominations are published.
3. Since voting is conducted electronically, there shall be no physical polling location requiring staffing by the Nominations and Elections Committee.
4. The Chairperson of the Committee shall be responsible for the safekeeping of the election results.
5. A call for the destruction of all electronic ballots shall be made after the election results have been officially announced.

	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 10/02/18
	Subject: Tabulation of Votes/Runoffs	

1. Once the voting has been completed, the votes shall be tabulated, or confirmed electronically depending on the voting platform used, by the Nominations and Elections Committee. A majority of all votes cast for each office is necessary for declaration of a winner for that office.
2. Upon confirmation of the voting results, 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 official announced at the conclusion of the electronic voting.
 - Notification of the runoff election and procedures to follow will be made available to the membership within one week of the confirmation of voting results. Information will be made available via the Association website and via other available electronic means.
 - A runoff ballot will be prepared and distributed to all eligible voting members within one week of the close of the election.
 - Members will vote within 7 days of the runoff ballot being made available.
 - Upon closing of the runoff ballot, votes shall be tabulated, or confirmed electronically depending on the voting platform used, 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 electronically 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 10/02/18

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 or 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
Mr. Ray Edwards
Mr. Dan Franz
Mrs. Sylvia Hudson
Mr. Cannon Mayes
Mr. Kim Jenerette
Ms. Tamy Garofano
Ms. Donna Quick
Ms. Allison Sullivan

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


Ms. Lynn Christian

	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 10/02/18

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. Judi Gillespie
 - Ms. Miriam Wilson
 - Mrs. Jennifer (Jones-Gaddy) Bomar
 - Mrs. Sallie Glover
 - Mrs. Donna Hawkins
 - Ms. Jacqueline Bell
 - Mr. Glenn Shumpert
 - Mr. Bill Whitlock
 - Mr. Robert Godfrey
 - Mrs. Ellen Green
 - Mr. Marvin Carmichael
 - Ms. Janie Reed
 - Mr. Fred Hardin
 - Ms. Deborah Williams
 - Ms. Tabatha McAllister


	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 10/02/18

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
 Mrs. Alice Suiter
 Mr. Robert (Bob) Patton
 Dr. Charles Witten
 Mr. William Mackie
 Dr. Edgar (Ed) Miller


	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
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Communications	DATE REVISED 4/15/13

SCASFAA promotes the dissemination of information to the financial aid community and other applicable industries to improve and establish internal and external relationships within the organization. In accordance with the bylaws, all forms of communication on the SCASFAA website, listserv, and social media platforms such as Facebook, etc. must be deemed appropriate.

In October 2011, the SCASFAA Executive Board voted to establish the Communications Committee. The Communications Committee will work collaboratively with the Electronic Services Committee to ensure that all communications support the mission and goals of SCASFAA. In addition to working jointly with the Electronic Services Committee, the Chair of the Communications committee shall work cooperatively with any other member of the Board as necessary to distribute pertinent information.

	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 01/25/18
	Subject: Web Site Procedures	

A SCASFAA web site shall be developed and maintained in order to provide a web-based platform to support the mission and goals of SCASFAA. The original SCASFAA website was developed and maintained by ATAC Corporation. In 2012, SCASFAA migrated to the website and database platform offered by Wild Apricot, and the site currently remains with Wild Apricot. The domain registrar for SCASFAA is Network Solutions. In addition, Network Solutions provides the security certificate for the website.

1. Access

A. Public-facing 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. Election and Candidate Information
3. Listserv
4. Administrative Services
5. Online Forms
6. Legislative Relations Information
7. Newsletter Archives
8. Recorded Webinar Archives


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. Content shall include, but is not limited to:


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 (archives)
10. Conference Information and Online Registration Form
11. Position papers/Legislative updates

	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 01/25/18
	Subject: Web Site Procedures	

12. High School Guidance Counselor Resources
13. Training/Professional Development Information
14. Listserv functionalities
15. Online Sponsorship Form
16. Executive Board/Committee Chair administrative functions
17. Payment/Finance administrative functions
18. Event Management administrative functions


1. **Posting Material**
Material to be posted to the website should be provided to the Electronic Services Committee Chair or to the Communications Committee Chair. The Chair will ensure that the provided material is appropriate for posting and will update the website accordingly.
2. **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.
3. **Site Location and Maintenance**
 - A. The site will be housed on web servers maintained by Wild Apricot
 - B. All website maintenance will be performed by the Electronic Services Chair
4. **Current Location**
The SCASFAA web site URL is <http://www.scasfaa.org>
The association also owns the URL domains for scasfaa.com and scasfaa.net, which prohibits other entities from using the SCASFAA acronym to create websites using those addresses. All three domains are registered with Network Solutions.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 112.3 AREA Electronic Services – Web Manager
	Policies & Procedures	DATE APPROVED 11/11/09 DATE REVISED 4/15/13
	Subject: Social Networks	


In November 2009, the SCASFAA Executive Board approved the creation of a SCASFAA “fan page” on the popular social networking site Facebook as a supplemental mechanism to communicate information to members and other interested parties. The following policy has been adopted by SCASFAA to establish and maintain consistent guidelines for the access to and use of Facebook and other online social network sites in conducting association business and professional activities.

1. There are several ways that SCASFAA may benefit from using public, web-based social networks, and the following are examples of legitimate SCASFAA usage of public social network sites:
 - Public outreach to communicate and deliver messages directly to members and other interested parties
 - Encourage involvement and volunteer opportunities within the association
 - Provide links to relevant online news articles of potential benefit and interest to SCASFAA members
 - Promote training opportunities provided by SCASFAA, including professional development activities and the Annual Conference
 - Provide reminders regarding SCASFAA events and activities (i.e. registration deadlines, conference hotel registration deadlines, membership renewal reminders)


1. The following policy includes the process and guidelines for gaining access to external social networks and for using such sites in conducting business on behalf of the association:
 - A. Administrative access to web-based social networking sites will be granted only to current Executive Board members (includes elected officers and appointed committee chairpersons). Ownership is shared among current Board members who have personal accounts set up with the website.
 - B. It is the responsibility of users to ensure that unauthorized persons are not allowed to make changes or post official updates to the official SCASFAA social networking site/page.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 112.3 AREA Electronic Services – Web Manager
	Policies & Procedures	DATE APPROVED 11/11/09 DATE REVISED 4/15/13
	Subject: Social Networks	


- C. Authorized users, as site administrators, have the authority to delete inaccurate, inflammatory, or inappropriate information, photos, and posts at any time.
- D. Use of SCASFAA social networking sites for personal use is prohibited. Examples of prohibited use include: downloading and installing plug-ins, joining groups while using a SCASFAA ID for personal reasons or adding personal friends directly to SCASFAA’s friend or fan list.
- E. If granted administrative access to a SCASFAA social network site, the following guidelines must be followed:
- a. Authorized users are bound at all times by all other existing Policies and Procedures of the association.
 - b. Posting of confidential information is prohibited.
 - c. Be smart and thoughtful about what content is posted, as your comments and actions reflect directly on the association.
 - d. Spell and grammar check everything prior to posting. Content posted may be permanent or may not be editable in some cases.
 - e. If in doubt, do not post or publish.

	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 06/07/16

1. The President shall appoint a Program/Conference Chairperson who will be responsible for the planning and dissemination of information of the annual conference.
2. The Program/Conference Chairperson shall be a member of the Executive Board and shall appoint a committee to assist with the planning of the conference. The Committee has traditionally included the President, Treasurer, and Sponsor Chairperson.
3. Conference sites are chosen in advance by the Site Selection Committee and approved by the Executive Board. The Program/Conference 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 information for the website, social media, and other appropriate channels of communication
 2. Conference pre-registration information shall include:
 - a. introductory information on behalf of the Committee
 - b. hotel reservation information, including rates, reservation deadlines, and reservation instructions
 - c. tentative program agenda as soon as available
 - d. miscellaneous information

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	Policies & Procedures	DATE APPROVED 07/01/97 DATE REVISED 06/07/16
	Subject: Procedures	


- E. Establish Program Agenda
1. Session topics
 2. Obtain Speakers
 3. Obtain moderators (use candidates for office, if available)
 4. Request Federal participants
 5. Obtain session description forms
 6. Work with 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. Anticipated numbers and menus to hotel
 8. Meal tickets
- G. Program Agenda
1. Include conference agenda
 2. Executive Board & Program Committee
 3. Maps
 4. 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, if not distributed electronically prior to the conference)
 - c. Budget to Date - (from Treasurer)
 - d. Nominations Form
 - e. Volunteer Form
 - f. Evaluation
 - g. Other information pertinent to the Conference

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 113.1 AREA Program
	Policies & Procedures	DATE APPROVED 07/01/97 DATE REVISED 06/07/16
	Subject: Procedures	


2. Nametags and Ribbons

I. Miscellaneous


1. Recognize first-time attendees
2. Signs - Session Titles
3. VIP transportation
4. VIP and presenter gifts
5. Entertainment
6. Work with Sponsor Chairperson on Sponsor Displays
7. Dress Code
8. Tourist information
9. Set-up times
10. Sessions evaluations
11. Flowers
12. Table decorations
13. Invite SASFAA/NASFAA representatives
14. Beverage tickets
15. Place cards
16. Dance/DJ/Decorations
17. Olympics or other activity
18. Voting Information
19. Arrange/coordinate Audio Visual (A/V) equipment
20. Recognition of Retirees
21. Thank you notes

	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 06/07/16

22. President's gift
23. 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 06/07/16


1. The Chairperson of the Program/Conference 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
	Subject: Standing Committees	DATE REVISED 02/27/97


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 114.2 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
	Subject: Committee Goals	DATE REVISED 06/18/92

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
	Subject: Budget Committee - Goals	DATE REVISED 6/20/14


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.
5. Complete the duties as assigned in the Long-Range Plan.

	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 06/20/14


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 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.
5. Complete the duties as assigned in the Long-Range Plan.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-C AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Consumer Relations Committee - Goals	DATE REVISED 06/20/14


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.
7. Complete the duties as assigned in the Long-Range Plan.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-D AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Counselor Relations Committee - Goals	DATE REVISED 06/20/14


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. 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.
8. Complete the duties as assigned in the Long-Range Plan.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-E AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Legislative Relations Committee - Goals	DATE REVISED 06/20/14

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 available means of communication 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.
9. Complete the duties as assigned in the Long-Range Plan.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-F AREA Committees
	Policies & Procedures	DATE APPROVED 07/25/88
	Subject: Long Range Planning Committee - Goals	DATE REVISED 06/20/14


The Long-Range Planning Committee is a Standing Committee.

1. The Chairperson of the Long Range Planning Committee shall be the immediate Past President or the President's appointee.
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 06/20/14

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. Insure accuracy and availability of online membership directory.
3. Recommend to the President and Executive Board ways to increase membership in the Association.
4. Maintain an effective communications network as a means of providing vital financial aid related information to participating members in a timely fashion.
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. 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.
8. Complete the duties as assigned in the Long-Range Plan.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-H AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84 DATE REVISED 06/30/17
	Subject: Communications Committee - Goals	


The Communications Committee is a non-standing committee

The 2011-2012 Executive Board voted to dissolve the former Newsletter Committee and create the Communications Committee in its place. By doing so, the Board also allowed for the discontinuation of the production of the hard-copy Palmetto Pages newsletter.

The Communication Chair shall serve as the primary manager of the digital newsletters sent to all membership through the website's email capabilities at least 3 times per year. This form of communication replaced the blog (The SCASFAA Scoop 2011-2014) due to the ability to track the number of people who open the email and click on the newsletter's link. This digital newsletter is called Palmetto Pages to keep with tradition. A template for this newsletter has been created to pass forward to the appointed Communication Chair each year.

To produce the digital newsletter, the Chair will:

1. Solicit pertinent articles, reports, and pictures from the SCASFAA membership and affiliates;
2. Edit articles for accuracy, quality and appropriate length and incorporate photographs and graphics when needed;
3. Review other state newsletters and other websites as well as regional websites, and NASFAA Today's News for articles appropriate to include in the digital newsletter;
4. Coordinate newsletter advertising with the vendor/sponsor chair;
5. Collect blog sponsorship ads and/or logos from sponsors;
6. Assist the vendor/sponsor chair and budget chair as needed to review, project and recommend rates for advertisements, including applicable discounts, on an annual basis;
7. Use the Communication Committee as an editorial board as needed to review the contents of articles as well as the proofing of the contents prior to publication;
8. Provide for and coordinate with any required announcement schedule that addresses any provisions set forth in the bylaws, such as the distribution of nominations and elections materials;
9. Complete the duties as assigned in the Long-Range Plan.


	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-H AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84
	Subject: Communications Committee - Goals	DATE REVISED 06/30/17

A tentative schedule of *The Palmetto Pages* digital newsletter follows:

Fall/Winter Edition
Spring/Elections Edition
Summer/End Year Edition
Other editions may be added as time permits


To assist the Electronic Services Chair in maintaining the official SCASFAA website, the Chair will:

1. Promote the use of the website for communication to the membership of important Association information and all Association activities.
2. 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.
3. Assist in the implementation of any long-range plan recommendations concerning communications that are deemed appropriate by the Board and the president.
4. 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-I AREA Committees
	Policies & Procedures	DATE APPROVED 07/17/84 DATE REVISED 01/25/18
	Subject: Electronic Services - Goals	


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. Coordinate the Association's use of the SCASFAA ListServ.
 - a. The Chairperson serves as a liaison between the Executive Board and the owner/manager of the SCASFAA ListServ.
 - b. Promote the use of the SCASFAA 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.
5. Coordinate the Board's use of free online storage for digital records through the Association's Google Account.
 - a. The Chairperson serves as the primary account holder of the scasfaa@gmail.com Google Account.
 - b. Ensure all board members have access to the respective position/committee folder within Google Drive if they wish to make use of the online storage.
 - c. Provide assistance with accessing electronic data when needed
6. 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.
7. 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.
8. Complete the duties as assigned in the Long-Range Plan

	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 06/20/14


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.
9. Complete the duties as assigned in the Long-Range Plan.

	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 06/20/14


The Program Committee is a Standing Committee.

1. Develop a worthwhile program of professional activity for the Association's annual meetings.
2. Identify and arrange for participation of speakers, resource individuals and federal representatives at the annual meetings.
3. Advise the membership of planned program activities at the upcoming annual meetings.
4. Make local arrangements for the annual 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.
9. Complete the duties as assigned in the Long-Range Plan.

	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 06/25/10


The Site Selection Committee is a Non-Standing Committee.

1. Determine sites for the annual 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 DATE REVISED 03/22/12
	Subject: Sponsorship Committee – Goals	


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 maintenance of electronic platforms (Web Site, blog, etc.) 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 DATE REVISED 04/06/13
	Subject: Global Issues Committee – Goals	


The Global Issues Committee is a Non-Standing Committee.

1. Provide sensitivity training in the areas of culture, health, race, religion, gender, sexual orientation, multigenerational and education to the SCASFAA leadership and members, as it relates to each other, the community, and the students served.
2. Develop activities that support the recruitment and retention initiatives of SCASFAA, while continuously promoting activities to assist in developing diverse leaders.
3. Develop opportunities to further educate and involve SCASFAA members in community awareness activities.
4. Provide support and assistance on diversity related issues to the membership.
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-S AREA Committees
	Policies & Procedures	DATE APPROVED June 25, 2007
	Subject: Advisory Committee to CHE	DATE REVISED 06/20/14


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.
6. Complete the duties as assigned in the Long-Range Plan.

	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 06/20/14


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.
4. Complete the duties as assigned in the Long-Range Plan.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-U AREA Committees DATE APPROVED September 16, 2013 DATE REVISED 10/7/13
	Policies & Procedures	
	Subject: Financial Planning Committee	

The Financial Planning Committee is a Non-Standing Committee.

1. Coordinate the process for completion of the Association's annual financial review.
2. Insure the long-term financial health of the Association by working with the Budget Committee to make recommendations concerning investments, both long-term and short-term.
3. Review and evaluate the Association's budgeting process, making recommendations to the Board for streamlining line-item budget categories or otherwise improving the budget process.
4. Review and evaluate the Financial Management Guide and Financial Review Guide, insuring the Treasurer and Treasurer-Elect possess a thorough understanding of these guidelines.
5. When needed, provide guidance to the Association Treasurer and Treasurer-Elect.

	South Carolina Association of Student Financial Aid Administrators	CODE NUMBER 114.2-V AREA Committees
	Policies & Procedures	DATE APPROVED March 29, 2019 DATE REVISED
	Subject: Volunteer Committee	

The Volunteer Committee is a Non-Standing Committee.

1. Coordinate the process for highlighting and promoting association volunteerism.
2. Review and evaluate the association's involvement procedures and opportunities.
3. Facilitate annual volunteer recruitment for association committees in conjunction with Executive Board.
4. Coordinate volunteer recognition events and/or opportunities.
5. Assist with SCASFAA's Leadership Education & Association Development Program (LEAD) in conjunction with President-Elect and Member-at-Large.
6. Complete duties as assigned in the Long-Range Plan.