

## **6. Duties and Responsibilities of Committees and Liaisons**

The committee chairpersons work in conjunction with the President to select committee members considering experience, ethnicity, sector interests and gender for approval at the first Executive Board meeting of the new fiscal year. Other committee members may be recommended for approval by the Executive Board during the course of the fiscal year, as appropriate. Each committee and liaison shall:

1. Develop goals and objectives in keeping with committee/liaison charges, and the By-Laws.
2. Submit articles to the newsletter editor and submit updates of activities to the web master for publication on the web site.
3. Prepare written reports and submit action items for each Executive Board meeting.
4. Submit by May 15 an end-of-the-year report to assess the committee's effectiveness in reaching its goals/objectives and make recommendations for future activities.
5. Comply with budget parameters and approve expenditures and requests of reimbursement in accordance with Association guidelines.
6. Establish a listserv, as appropriate, to foster electronic communications among members.
7. Forward to their successors all pertinent records and reports by August 1. In the event of a committee chairperson's resignation or removal from office, all of

his/her records must be submitted to his/her successor or to the Association Secretary, as appropriate, within 30 days.

8. Perform other duties as requested by the President and provide copies of correspondence to the President.

## **6.1 Committees**

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

Unless specified otherwise, committee appointments shall be made by the President and approved by the Executive Board in such a manner as to maximize continuity of Association functions. This may be accomplished by, but is not restricted to, selecting committee chairpersons who have experience relative to the defined responsibilities of the committee.

### **6.1.2 Standing Committees**

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

- Awards and Recognition
- Budget
- By-Laws
- Communications/Newsletter
- Conference
- Diversity
- Financial Review
- Legislative Relations
- Local Arrangements
- Membership
- Nominations and Elections
- Professional Development
- Publications and Public Relations

### **6.1.3 Discretionary Committees and Liaisons**

Discretionary committees and liaisons are those appointments which the Executive Board recognize as being necessary to fulfill distinct needs of the Association. However, the President has the discretion whether to activate these committees from one administration to the next. The President, with the approval of the Board, may identify additional discretionary committees and liaisons as the needs of the Association warrant.

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

Discretionary committees and liaisons generally include the following:

- Archives Coordinator
- Governance
- Long-Range Planning
- Photographer
- Scholarship Coordinator
- Site Selection
- Sponsorship
- State Agency Liaison
- Postsecondary Education Liaison

#### **6.1.4 Special Ad Hoc Committees**

At the discretion of the President and/or the Executive Board, certain ad hoc committees may be established to address special, short-term projects. In contrast to discretionary committees, and given the primary purpose of these committees, it is unlikely that these committees will continue beyond one year.

### **6.2 Archives Coordinator (a discretionary appointment)**

The Archives Coordinator is responsible for receiving, recording, storing, and reporting materials and documents of historical significance and usefulness to the Association. It is preferable for Association archives to remain at a designated location for an extended period of time, rather than having archival materials shifted to a different location each year.

### **6.3 Awards and Recognition**

The members of the Committee shall be active members who are recipients of either the Padgett Outstanding Achievement Award or the Buchanan Distinguished Service Award given by the Association. The Immediate Past President chairs the Committee, but may designate another past president who has received either the Padgett Award or the Buchanan Award to serve in this position. The Committee recommends individuals for

the outstanding achievement, distinguished service, and honorary membership awards. In this capacity, the committee:

1. Solicits nominations for recognition of outstanding, significant and meritorious contributions to the advancement of student financial aid.
2. Makes recommendations to the Executive Board.
3. Provides appropriate plaques to be presented to the recipients at an annual conference, including honorary membership when the recipient ceases to meet active membership eligibility requirements.

#### **6.4 Budget**

The Budget Committee develops and recommends financial management strategies to ensure the fiscal integrity of the Association. To achieve these goals, the Budget Committee:

1. By the July/August Executive Board meeting, prepares the fiscal budget in collaboration with the President and Treasurer.
2. Recommends Conference Committee budgets which shall include costs for local arrangements functions.
3. Monitors expenditures, analyzes cash flow trends, and advises the Executive Board regarding short-term investments.
4. Assesses with the Conference, Publications and Public Relations and Membership Chairpersons, the handling of bulk mailings.
5. With the Treasurer, conducts quarterly reviews of cash balances and expenses and makes appropriate recommendations.
6. Recommends budget adjustments as appropriate to stay within budget guidelines.
7. Maintains a copy of the Association's software, as well as monthly back-up files of the Association's financial data from the Treasurer.
8. Reviews all contract proposals and makes recommendations to the President.
9. Stays abreast of tax laws that affect the Association.
10. Reviews and recommends annually with the Sponsorship Chairperson the rates for advertisements, including applicable discounts.

The Budget Committee Chairperson shall co-sign with the Treasurer or President all payments over \$2,500 if either the Treasurer or President is unavailable.

## **6.5 By-Laws**

The By-laws Committee reviews the By-Laws governing the Association and recommends necessary By-Laws changes to the Executive Board. The Secretary of the association shall serve as a member of the By-laws Committee.

## **6.6 Communications/Newsletter**

### **6.6.1 Communications**

The Communications/Newsletter Committee explores ways to enhance the internal and external communications of the Association using a variety of media from paper to electronic formats. In this capacity the Committee:

1. Provides guidance for the development, maintenance and enhancement of the AASFAA web site.
2. Encourages development and utilization of cost-efficient, timely means of communication, including the web, listserves and e-mail by the Executive Board, committees and the membership.
3. Provides guidance and suggestions to the Executive Board and committee chairpersons on ways to improve communications with the membership.
4. Periodically surveys the membership as to their needs and satisfaction with information provided by AASFAA, and solicits suggestions for improvement.
5. Periodically evaluates software options and makes recommendations to the Executive Board about the purchase of software which will enhance and facilitate communication and transmission of data between the Treasurer and Membership Chairperson and within and between committees. Such software applications may include, but are not limited to, word processing, database, spreadsheet, presentation and e-mail software.
6. Assists in the implementation of any long range plan recommendations concerning communications that are deemed appropriate by the Executive Board and the President.
7. Provides an annual report of committee activities to the Executive Board and the President for inclusion in the Association's annual report.

8. Develops and monitors contingency plans to transfer listserve and web site management to other locations.

Presently, AASFAA maintains the following list serve addresses for member use:

AASFAA-EXEC-L - Executive Board address  
AASCON-L - Conference Committee  
AASLEG-L - Legislative Relations

### **6.6.2 Newsletter**

The newsletter editor provides periodic publications reporting on activities and issues that affect the Association's membership. To disseminate information, the editor may use paper-based and/or electronic methods of communication. Typically four issues are produced, with distribution set for October, December, April and June. Printing and distribution of the newsletter must comply with fiscal year and By-Laws requirements.

To produce the newsletter, the editor:

1. Edits articles for accuracy, quality and appropriate length and incorporates photographs and graphics when needed.
2. Coordinates newsletter advertising with the Sponsorship Chairperson and assists in projecting revenues for the Budget Committee.
3. Forwards copies to the regional association President and President-Elect and the NASFAA Chairperson and Chairperson-elect.
4. Reviews and recommends annually with the Budget Chairperson the rates for advertisements -- including applicable discounts.
5. Works with the Budget Chairperson to assess the need for bulk rate mail service.
6. Develops a print distribution schedule which addresses any provisions set out in the Association By-Laws, such as the distribution of nominations and elections materials.

### **6.7 Conference**

The Conference Committee plans the Association's fall and spring conferences that include training, professional development and networking activities. To achieve these duties, the Committee:

1. Coordinates conference activities with the Sponsorship, Professional Development, Budget, Membership, and Local Arrangements committees.
2. Works with the Budget Chairperson to assess the feasibility of using bulk mail.
3. Solicits proposals to develop general and interest sessions and secures speakers which appeal to the various sectors and experience levels of the membership.
4. Reviews evaluations from prior conferences to assess interests and needs for appropriate adjustments for current conference plans.
5. Plans as necessary, pre-conference or post-conference workshops and seminars which address the needs of different segments of the membership.
6. Assists in developing the conference budget and adheres to the approved budget.
7. Secures volunteers to help perform the duties of the Committee.
8. Maintains all related correspondence and materials and conducts a conference evaluation for the future Conference Chairperson.
9. Provides news articles and promotional materials for the newsletter, conference mailings, and the AASF AA listserv and web site.
10. Reports on activities to the webmaster and presents reports to the Executive Board.
11. Considers alternatives for locations for planning meetings whenever possible to keep costs at the most reasonable level.
12. Provides a list of approved conference activities/entertainment to the Sponsorship Chairperson.

## **6.8 Diversity**

The Diversity Committee explores ways to enhance the participation of all sectors and members in Association programs, activities, and services. To promote this objective, the Committee:

1. Provides recommendations to the Conference Committee for ways to promote diversity in annual Association programs.
2. Provides recommendations to the Executive Board for ways to promote diversity in Association activities and services.

## **6.9 Financial Review**

The Financial Review Committee oversees and monitors financial management operations to ensure fiscal integrity of the Association. To achieve these goals, the Finance and Audit Committee:

1. Reviews all expenditures and advises the Budget Committee and the Executive Board of any activities that could impact on the fiscal integrity of the Association
2. Monitors the financial management strategies recommended by the Budget Committee.

#### **6.10 Governance (a discretionary committee)**

The Governance Committee evaluates and monitors the progress of the Association toward meeting its long-range plans and makes recommendations to the Executive Board regarding future goals and objectives. In addition, the Committee:

1. Reviews, evaluates and reports long-range planning objectives and committee findings at the transitional Board meeting, and subsequently with the membership.
2. Maintains a historical record of all modifications, deletions and additions to the long-range plan in a structured and consistent format for future assessment of compliance.
3. May establish a Committee listserv and provides updates and evaluations of the long-range plan in the newsletter and on the web site.
4. Makes recommendations to the President.

#### **6.11 Legislative Relations**

The Legislative Relations Committee reviews, analyzes, evaluates and prepares responses to federal and state regulatory, legislative and funding issues. This committee:

1. Includes representation of all sectors by institutional control type.
2. Advises members and the Executive Board of federal and state regulatory and legislative issues.
3. Establishes information linkages with national and state representatives.
4. Develops timelines to respond to legislative or regulatory proposals.
5. Drafts correspondence, prepares position papers, drafts surveys, and provides testimonies for the President.

6. Plans interest sessions in collaboration with the Conference Committee on legislative issues, such as reauthorization, at the conferences.

## **6.12 Local Arrangements**

The Local Arrangements Committee assists the Conference Committee in hosting a conference. To accomplish this task, the Committee:

1. Coordinates conference activities with the Conference Committee.
2. Provides on-site assistance for the conference.
3. Assists with the procurement of special amenities, such as transportation, flowers, gifts, and other services as needed.

## **6.13 Long-Range Planning (a discretionary committee)**

The Long-Range Planning Committee assesses future goals and objectives to ensure continued viability and effectiveness of the Association in fulfilling its mission. Additionally, the Committee:

1. Develops a strategic plan for continued leadership and fiscal integrity.
2. Ensures the plan is periodically evaluated and necessary adjustments are made.
3. Reviews annual year-end reports to assess committee and Executive Board effectiveness in meeting goals and objectives, consistent with the mission of the Association.
4. Makes recommendations for changing or expanding services, activities and roles of the Association.
5. Makes observations regarding Association trends.
6. Gathers relevant data and information from the membership, Executive Board, and other relevant organizations and associations to identify potential internal or external threats to the Association.
7. Periodically reviews and assesses the Association's mission statement for change.

## **6.14 Membership**

Using software provided by the Association, the Membership Committee maintains an accurate and up-to-date database listing of members. This database should contain the following information:

1. first name, middle initial, last name and title;
2. mailing address (street, city, state and zip code);
3. institution, government agency, or organization;
4. facsimile number;
5. telephone number;
6. institution type;
7. electronic mail address; and
8. date of initial membership, if known.

To help facilitate these duties, the Committee also:

1. Maintains membership forms in alphabetical order after the Treasurer forwards paid membership forms.
2. Maintains the database on a personal computer diskette that is backed up at least once per month.
3. Forwards to the webmaster a monthly report of new members.
4. Assists the Treasurer in developing membership forms and works with the Conference Chairperson to develop conference forms.
5. Produces labels of current and previous year members for Association mailings (newsletter, conference registration, etc.), including providing labels to those who are approved to purchase Association labels.
6. Prints and mails the membership directory (as soon after the close of the fiscal year as possible) if the directory is produced in printed form
7. Assists the Treasurer with on-site registration at annual conferences.
8. Provides alphabetical lists of current paid members to the Nominations and Elections Committee for handling voting at the annual conference.
9. Works with the Budget Chairperson to assess the need for bulk mail.

## **6.15 Nominations and Elections**

The Nominations and Elections Committee, chaired by the Immediate Past-President, presents a slate of candidates who meet the criteria for the offices of President-Elect, Secretary, Treasurer-Elect, and Vice President and solicits the names of individuals to be considered for honorary membership.

Honorary membership nominations also can be made by any voting member of the Executive Board.

The Committee coordinates and conducts the annual elections in accordance with procedures in Section 6.14.3.

### **6.15.1 Nominations**

Prior to the Board meeting that immediately precedes the annual spring conference (generally February); the Nominations and Elections Committee must determine who will be recommended as candidates for offices for the upcoming year. To obtain recommendations from the membership, the committee must solicit written nominations in advance of this meeting. Nominations must be presented to the chairperson through the use of a nomination form distributed to the membership. Completed nominations forms must be submitted no less than forty-five (45) days prior to the date of elections. Solicitation may occur via email, the newsletter, or through a separate mailing to the active membership no later than sixty (60) days prior to the spring conference.

The Chairperson sets the date, time and place for a meeting of the Committee. Normally, the meeting is held at a time and location convenient to most Committee members.

The Committee shall present no more than a dual slate for each office if at least two qualified, consenting nominees are presented to the Committee. The chairperson shall submit candidates' biographical and other pertinent data to the AASFAA web master. Also, notice shall be given on the AASFAA web site that any member wishing to present a nomination during the opening business session of the annual Spring Conference should advise the President and the Chairperson of Nominations and Elections.

The Chairperson shall prepare and present to the Board a written report that includes the proposed slate, the rules adopted by the Committee, members present at the Committee meeting, and recommendations for consideration for future Committee meetings. This is typically reported to the Executive Board meeting in February.

### **6.15.2 Restrictions on Campaigning**

The intent of these guidelines is to provide equal opportunity for all candidates and to reduce the costs of campaigning for AASFAA offices.

Each candidate will be featured on the AASFAA web site at least thirty days prior to the annual spring conference. Each candidate will be asked to provide a black and white glossy photograph and obtain a copyright release so the picture can be used for AASFAA election purposes. Each candidate will be allowed a maximum of 500 words total for a resume and a statement of candidacy. This information shall be posted on the AASFAA Web Site.

Each candidate will be introduced at the initial business session of the annual spring conference and permitted three minutes to address the membership.

Candidates are not permitted to distribute campaign paraphernalia such as buttons, pins, ribbons, stick-ons, and printed sheets and cards.

No hospitality suites are to be held in support of the candidacy of any individual.

No mass solicitation to the AASF AA membership (excluding the AASF AA newsletter and web site feature) shall be made by or on behalf of a candidate prior to or at the spring conference.

No campaigning will be permitted in the immediate vicinity of the polls.

Election information printed in the AASF AA newsletter will be prominently posted near the polling place. Additional copies of the information will be available for distribution at the registration desk.

### **6.15.3 Elections**

The chairperson shall submit its recommendation of candidates to the Executive Board sufficiently in advance of the annual conference to allow notification to the membership at least thirty (30) days prior to the date of elections.

The general election shall be held during the annual spring conference. A business meeting shall be scheduled early in the conference at which time the slate of candidates approved by the Executive Board and/or the membership will be presented.

All candidates shall be introduced to the membership at the opening business meeting.

A polling place will be established for conducting the election. AASF AA members will, after verification of membership status, be provided an opportunity to vote. Unless otherwise specified in the By-Laws or this section of the Manual, printed ballots will be used. The Committee chairperson is responsible for preparation of ballots.

The polling place shall be open following the initial business meeting and from 8:00 am until 12:00 noon on the day following the initial business meeting session at which the candidates are introduced, except for periods when general sessions are scheduled.

The polling place shall be staffed continuously during the above prescribed time by members or designees of the Nominations and Elections Committee. The chairperson bears responsibility for the safekeeping of ballots. The Nominations

and Elections Committee shall tabulate the election results with the AASFAA Secretary in attendance, unless the Secretary is a candidate for office. In this case, the President or his/her designee shall be in attendance.

The Nominations and Elections Chairperson shall report the results of the election at a business session following completion of voting. Prior to that time, however, the President and each candidate will be contacted and informed of the election results.

#### **6.15.4 Absentee Ballot Process**

A voter must be a paid member at the time balloting begins at the annual spring conference.

An absentee ballot shall be either included in the AASFAA newsletter issued prior to the annual conference or provided by direct mailing to all paid members.

The absentee ballot must be received no fewer than thirty (30) days before the annual conference. Absentee ballots should be formatted to retain anonymity, but ensure verification of voter eligibility status. The voter must provide his/her name in the return address or on an enclosed sheet or card so voter eligibility can be determined by the committee.

The absentee ballots must be received by the chairperson of the Nominations and Elections Committee at least six (6) days prior to the opening of the annual conference. Ballots received after that date will be marked “void” and destroyed.

Members who vote by absentee ballot and who attend the conference cannot vote in the general election, but may vote in the case of a run-off election.

Pursuant to Section 6.13.3, absentee ballots shall be counted at the same time and place as ballots cast at the annual spring conference.

#### **6.15.5 Special Elections**

1. A special election shall be called by the Executive Board in the event of a vacancy in the office of President-Elect.
2. The Nominations and Elections Committee shall solicit candidates and provide to the membership within thirty days of the announced special election a ballot containing no more than two names, along with the option for a write-in candidate.
3. In the event a vacancy occurs in the office of President-Elect within sixty days of the annual conference, the election will be held during the Annual Conference.

4. Unless otherwise specified in the By-Laws or Section 6.14.3 of the Manual, the election shall be conducted by mail ballot.
5. Ballots must be returned to the chairperson of the Nominations and Elections Committee within fifteen (15) calendar days from the date the ballots are mailed. All ballots shall be mailed first class. Ballots should be returned by first class mail to assure timely receipt by the Nominations and Elections Chairperson.
6. The ballots shall be counted and membership verified by the Nominations and Elections Chairperson and the Secretary.
7. The winner will be the person who received a majority (more than half) of the votes cast.
8. All voters must be active members at the time ballots are distributed.
9. Within ten calendar days following the balloting deadline, the chairperson of the Nominations and Elections Committee shall notify the President of the results of any special election.
10. The President shall notify the membership of the election results either through special communication or in the newsletter.

#### **6.15.6 Run-Offs**

In the event a candidate does not receive more than fifty percent (50%) of the votes cast for that office, there will be a run-off election between the two candidates with the most votes. Balloting shall be done with printed ballots, unless otherwise specified in the By-Laws or Section 6.14.3 of this Manual. Balloting shall take place as soon as practical following determination that a runoff election is necessary. The election shall be conducted as described in 6.14.3.

The President shall notify the membership of the election results through special communication or in the newsletter.

#### **6.16 Professional Development**

The Vice-President serves as chairperson of the Professional Development Committee. The Committee plans, develops and conducts training activities that contribute to the competency and professional advancement of financial aid professionals. To accomplish its goals, the Committee:

1. Researches and studies developments and trends in the financial aid field to make recommendations to the Executive Board on professional development needs.
2. Develops materials, obtains sponsorship (through coordination with the sponsorship chairperson,), and conducts training and professional advancement programs to meet the needs of the membership.
3. Identifies locations and develops schedules for training activities.
4. Constructs a preliminary budget proposal with assistance from the Budget Chairperson.
5. Coordinates new aid officers' workshops at the annual conferences.

#### **6.17 Public Relations/Photographer (a discretionary appointment)**

The Public Relations/Photographer is responsible for taking, displaying, and distributing photographs of Association functions, especially the annual conferences. Generally, the photographer will take digital photos and provide copies for attendees at the meeting. Over the past several years, the photographer has displayed copies of photographs taken for members to have. Usually attendees will take copies of photos of themselves. Additional copies are available to distribution to the media and for use by Association officers and committees. The Association currently reimburses the Photographer for expenses related to the taking of photos at official Association functions.

#### **6.18 Scholarship Coordinator (a discretionary appointment)**

It is the responsibility of the Scholarship Coordinator to ensure that:

1. The institutions the scholarship recipients will attend are determined and announced at the annual spring conference. The procedure for selecting the institutions the selected scholarship recipients will attend can be found as Attachment 6.18.1.
2. Institutional representatives from colleges and universities the scholarship recipients will attend are provided congratulatory letters and Legacy Scholarship brochures for each scholarship recipient. A copy of the letters for financial aid administrators is included in Attachment 6.18.2.a. A copy of the letter for the Shirley Speer Scholarship recipient is included in Attachment 6.18.2.b. A copy of the letter for the Floyd Johnston Scholarship recipient is included in Attachment 6.18.2.c. A copy of the letter for the Bill Gentry Scholarship recipient is included in Attachment 6.18.2.d. A copy of the letter for the Theresa Duke Scholarship recipient is included in Attachment 6.18.2.e. A copy of the letter for the William H. Wall Scholarship recipient is included in Attachment 6.18.2.f.

3. Institutional representatives from colleges and universities the recipients will attend are provided a sample invoice form for the institutional representative to request scholarship payment by the AASFAA Treasurer. A sample invoice form can be found as Attachment 6.18.3.

### **6.18.1 Scholarship Selection Procedure**

The Scholarship Coordinator will follow these procedures to select the institutions the recipients of the Association's five scholarships will attend:

1. Following the close of registration on the second day of the spring conference, the Scholarship Coordinator will collect individual cards or sheets indicating the name of an Alabama college or university having a registrant at the conference.
2. Only one Alabama college or university will be listed on each card or sheet.
3. Each Alabama college or university will have only one card for the drawing, in order to give all institutions – small and large – an equal opportunity for selection.
4. In the presence of either the Treasurer or the Treasurer-elect, the Scholarship Coordinator will conduct a random drawing of institutions from all the cards provided.
5. Scholarship selection will be made in the following order:
  - i. Shirley Speer Scholarship
  - ii. Floyd Johnston Scholarship
  - iii. Bill Gentry Scholarship
  - iv. Theresa Duke Scholarship
  - v. William H. Wall Scholarship
6. The Scholarship Coordinator will notify the President of the institutions selected to receive each scholarship. Names of the winning institutions will be announced by the President during the Awards Banquet.
7. The Scholarship Coordinator will provide the President an envelope for presentation to a representative from each institution receiving a scholarship. Each envelope should contain the following items:
  - i. 2 copies of AASFAA's Legacy Scholarship Brochure (one to provide to the scholarship recipient at the institution, and one for information for the financial aid administrator.

- ii. Information about requesting the scholarship funds from the AASFAA Treasurer
- iii. A sample invoice form to request the scholarship funds (see Attachment 6.18.3)

**Attachment 6.18.2.a.**

**Alabama Association of Student  
Financial Aid Administrators, Inc.**

100 North Union Street, Suite 308  
Montgomery, AL 36104

Date

Dear Financial Aid Administrator:

Congratulations.

Your institution has been selected in a random drawing to receive the \_\_\_\_\_ **Legacy Scholarship**, one of the five Legacy Scholarships provided annually by the Alabama Association of Student Financial Aid Administrators, Inc.

These five scholarships are awarded in memory or honor of members who served the association and are a fitting way for the association to do our part to assist students who need our help in achieving their educational goals. This scholarship program provides \$5,000 in assistance to students annually.

We have included with this material a brochure that explains the Legacy Scholarship Program and an envelope with information for you to provide the \_\_\_\_\_ **Legacy Scholarship** recipient you select.

We appreciate this opportunity to serve one of your students.

Sincerely,

*William H. Wall*

**Scholarship Coordinator**

Alabama Association of Student  
Financial Aid Administrators, Inc.

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**Attachment 6.18.2.b.**

**Alabama Association of Student  
Financial Aid Administrators, Inc.**

100 North Union Street, Suite 308  
Montgomery, AL 36104

Date

Congratulations.

You have been selected by the financial aid administrator at your institution to receive one of the five Legacy Scholarships provided annually by the Alabama Association of Student Financial Aid Administrators, Inc. Your scholarship is provided in memory of a distinguished former member, *Shirley Speer*.

Additional information about the Legacy Scholarship Program is provided in the enclosed brochure.

The Alabama Association of Student Financial Aid Administrators, Inc. is an association of caring professional who assist students in securing financial assistance to pursue college-level studies. Currently, there are around 350 professionals from public and private, two-year and four-year colleges and universities in Alabama.

In return for providing these scholarship funds to you, we ask you to fulfill one request – *to provide your name and your educational and career plans to Shirley's daughter, Mrs. Sheri Speer Parker, who is interested in knowing about you.*

Best wishes for every success with your academic career.

Sincerely,

*William H. Wall*

**Scholarship Coordinator**  
Alabama Association of Student  
Financial Aid Administrators, Inc.

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**Attachment 6.18.2.c.**

**Alabama Association of Student  
Financial Aid Administrators, Inc.**

100 North Union Street, Suite 308  
Montgomery, AL 36104

Date

Congratulations.

You have been selected by the financial aid administrator at your institution to receive one of the five Legacy Scholarships provided annually by the Alabama Association of Student Financial Aid Administrators, Inc. Your scholarship is provided in memory of a distinguished former member, ***Floyd Johnston***.

Additional information about the Legacy Scholarship Program is provided in the enclosed brochure.

The Alabama Association of Student Financial Aid Administrators, Inc. is an association of caring professional who assist students in securing financial assistance to pursue college-level studies. Currently, there are around 350 professionals from public and private, two-year and four-year colleges and universities in Alabama.

In return for providing these scholarship funds to you, we ask you to fulfill one request – ***to provide your name and your educational and career plans to Floyd's wife (now remarried), Mrs. Beverly Folmar, who is interested in knowing about you.***

Best wishes for every success with your academic career.

Sincerely,

*William H. Wall*

**Scholarship Coordinator**

Alabama Association of Student  
Financial Aid Administrators, Inc.

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**Attachment 6.18.2.d.**

**Alabama Association of Student  
Financial Aid Administrators, Inc.**

100 North Union Street, Suite 308  
Montgomery, AL 36104

Date

Congratulations.

You have been selected by the financial aid administrator at your institution to receive one of the five Legacy Scholarships provided annually by the Alabama Association of Student Financial Aid Administrators, Inc. Your scholarship is provided in memory of a distinguished former member, ***Bill Gentry***.

Additional information about the Legacy Scholarship Program is provided in the enclosed brochure.

The Alabama Association of Student Financial Aid Administrators, Inc. is an association of caring professional who assist students in securing financial assistance to pursue college-level students. Currently, there are around 350 professionals from public and private, two-year and four-year colleges and universities in Alabama.

In return for providing these scholarship funds to you, we ask you to fulfill one request – ***to provide your name and your educational and career plans to Bill's daughter, Mrs. Teresa Gentry Hunter, who is interested in knowing about you.***

Best wishes for every success with your academic career.

Sincerely,

*William H. Wall*

**Scholarship Coordinator**

Alabama Association of Student  
Financial Aid Administrators, Inc.

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**Attachment 6.18.2.e.**

**Alabama Association of Student  
Financial Aid Administrators, Inc.**

100 North Union Street, Suite 308  
Montgomery, AL 36104

Date

Congratulations.

You have been selected by the financial aid administrator at your institution to receive one of the five Legacy Scholarships provided annually by the Alabama Association of Student Financial Aid Administrators, Inc. Your scholarship is provided in memory of a distinguished member, ***Theresa Duke.***

Additional information about the Legacy Scholarship Program is provided in the enclosed brochure.

The Alabama Association of Student Financial Aid Administrators, Inc. is an association of caring professional who assist students in securing financial assistance to pursue college-level students. Currently, there are around 350 professionals from public and private, two-year and four-year colleges and universities in Alabama.

In return for providing these scholarship funds to you, we ask you to fulfill one request – ***to provide your name and your educational and career plans to Theresa's daughter and mother, Ms. Amanda Duke and Mrs. Blanche Duke, who are interested in knowing about you.***

Best wishes for every success with your academic career.

Sincerely,

*William H. Wall*

**Scholarship Coordinator**  
Alabama Association of Student  
Financial Aid Administrators, Inc.

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**Attachment 6.18.2.f.**

**Alabama Association of Student  
Financial Aid Administrators, Inc.**  
100 North Union Street, Suite 308  
Montgomery, AL 36104

Date

Congratulations.

You have been selected by the financial aid administrator at your institution to receive one of the five Legacy Scholarships provided annually by the Alabama Association of Student Financial Aid Administrators, Inc. Your scholarship is provided in honor of a longtime member, ***Dr. William H. Wall.***

Additional information about the Legacy Scholarship Program is provided in the enclosed brochure.

The Alabama Association of Student Financial Aid Administrators, Inc. is an association of caring professional who assist students in securing financial assistance to pursue college-level students. Currently, there are around 350 professionals from public and private, two-year and four-year colleges and universities in Alabama.

In return for providing these scholarship funds to you, we ask you to fulfill one request – ***to provide your name and your educational and career plans to Dr. and Mrs. William H. Wall, who are interested in knowing about you.***

Best wishes for every success with your academic career.

Sincerely,

*William H. Wall*

**Scholarship Coordinator**  
Alabama Association of Student  
Financial Aid Administrators, Inc.

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Enclosure

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**Attachment 6.18.3**

**Sample Scholarship Invoice**

The following type of scholarship invoice should be used to request scholarship payment for a student selected by the financial aid administrator at the institution designated to receive scholarship funds for the year. Scholarship awards are for an amount not to exceed \$1,000 for one academic year. Funds should be requested only for students scheduled to be enrolled during the academic year. Funds may be disbursed only to students enrolled at least half-time and having a financial need for the academic year at least equal to the amount of the scholarship. Funds may be disbursed during any term of at least six weeks duration. Only one request for payment should be submitted for each scholarship recipient.

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**Invoice**

**Date**

**TO:           Name of AASFAA Treasurer  
              Institution  
              Address  
              City, State ZIP**

**FROM:       Name of Institution Awarded Scholarship  
              Institution  
              Address  
              City, State ZIP**

**Please forward (Amount up to \$1,000) for the following student selected to receive the (Name of the scholarship) Scholarship:**

**Name of Student  
Student Identifier (Student Number)**

**I understand payment will be issued jointly to the student and to the institution and agree that monies will be disbursed only after the student has enrolled for an eligible term at the institution.**

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**Signature of Financial Aid Administrator**

**Date**

## **6.19 Site Selection**

The Site Selection Committee evaluates and recommends locations for future annual conferences and other meetings. The Committee:

1. Visits viable sites and evaluates them using the AASFAA site facility guideline and hotel checklist (see Attachment 6.19.1 and 6.19.2 for additional information pertaining to site selection procedures and facility guidelines, respectively).
2. Provides to the Executive Board a site report with a recommendation and tentative contract for a future site.
3. Works to secure final contracts for the President's signature.
4. Assists the President and other committee chairpersons with the identification of meeting locations, as requested.

### **6.19.1 Conference Site Selection Guidelines**

To be considered as a possible host site for an AASFAA conference, a facility must have the following minimum physical capabilities:

1. Capable of committing 100 rooms for lodging with an overflow hotel nearby for another 50 rooms, if necessary.
2. Have four to five (4-5) break-out rooms for group meetings. Must have total seating capacity of 250.
3. Banquet facilities for 200-300 people.
4. Theater style seating for 300 people for a general session.
5. Display space for 40 vendors with 8' X 10' booths.

Questions should be referred to the Site Selection Chairperson.

## **6.20 Sponsorship Coordinator (a discretionary appointment)**

A sponsor is a company or organization whose activities either support or are closely related to those of the financial aid community and who provides resources to be used by AASFAA in accordance with the purposes of the Association. Sponsors may promote their products and services for the purpose of soliciting business.

All sponsored activities must be coordinated through the Sponsorship Coordinator.

The Sponsorship Coordinator conducts all solicitations for advertising, exhibitor space, direct or indirect sponsorship of training events and activities, and selected publications of the Association. As part of the solicitation, the Coordinator:

1. Develops materials and brochures for potential contributors.
2. Identifies activities and events for sponsorship opportunities including directory advertisements, the annual conference, new aid officer workshops and other training events, and Executive Board meetings.
3. Prepares and mails solicitations of sponsorship opportunities to potential sponsors.
4. Serves as the liaison to the Conference Committee for sponsorship needs and effective use of exhibitor spaces.
5. Publicly recognizes the contributions of all sponsors.
6. Reviews and recommends annually with assistance from the Budget Chairperson (or Treasurer when there is no Budget Chairperson) the standard advertising rates as well as any discounts offered to sponsors.
7. Reviews the policies affecting sponsorship and makes recommendations when appropriate.
8. Designs the exhibitor floor plan for the conference.
9. Mails special instructions regarding exhibit space and storage of materials for exhibitors in advance of the conference.
10. Coordinates all vendor and sponsor activities.

#### **6.20.1 Sponsorship of AASFAA Conferences**

1. AASFAA requests sponsorship for such items as refreshment breaks, meal functions, conference program printing, entertainment, and other costs associated with the annual conferences.
2. A sponsor who sponsored or supported an AASFAA event at the previous conference shall have the right of first refusal for that same item for the current year.
3. All sponsors will be recognized in the conference program for their contributions. To receive such recognition, a commitment for the

sponsorship of the event must be made by the time the program is prepared for printing.

4. All sponsors shall have an opportunity to provide a brief description about their organization to be printed in the conference program.
5. A reception or some form of public recognition to honor the contributions of the sponsors, by category, will occur during the annual conference and will be coordinated by the President and/or the sponsorship and conference chairpersons.
6. Each exhibitor to the conference will be provided space and a display table at the conference, if so requested.
7. Each exhibitor will be expected to provide any special arrangements for display tables at the conference, including telephone, audio-visual equipment, extra electrical needs, etc.
8. All sponsors will be permitted to have promotional drawings and/or other marketing items to be given at their booths.
9. The sponsor's principal representative must specify the individuals in their organization who are to receive complimentary registration to the sponsorship chairperson in advance of the conference.
10. In order to receive recognition as a sponsor, the sponsor must contribute at least \$600.
11. AASFAA recognizes and provides incentives for the following categories of sponsorship at conferences, based on the amount contributed.

Vendors: A minimum contribution of \$450;

Sponsors: A minimum contribution of \$600 (for such items as coffee breaks, printing, advertisements, or other activities of the Association).

Patrons: A minimum contribution of \$1200 as a direct contribution to the Association or a special function paid directly by the patron, such as:

- Conference program printing
- Conference reception
- Conference support
- Directory
- Major project.

12. A complimentary conference registration will be provided for each sponsor and patron in the categories of one registration for each \$800 contribution (1 - \$800, 2 - \$1600, 3 - \$2400, etc.) A sponsor or patron who sponsored or supported an AASF AA event a previous year shall have the right of first refusal during the current year.
13. All vendors, sponsors, and patrons will be recognized for their contribution(s) in the conference program.
14. A reception in honor of the contributions of the vendors, sponsors, and patrons will be during each conference and recognition in the categories will be made by the President and the Sponsor Coordinator of the conference.
15. Each contributor to the conference (vendors, sponsors, and patrons) will be provided a table at the conference if so requested.
16. All contributors will be expected to provide any special arrangements for the display tables at the conference.

#### **6.20.2 Sponsorship of Non-Conference Activities**

1. Sponsorship may be sought to offset the costs of other Association costs, such as activities for other training workshops or events not held as a part of the annual conferences, or for the printing of publications.
2. Neither exhibit space nor complimentary registrations are provided to sponsors for their contributions to these events and activities. However, sponsors are recognized for their financial support of such activities as appropriate.

#### **6.20.3 Additional Sponsorship Policies**

1. All sponsors may purchase mailing labels of AASF AA members at cost. Interested sponsors should be directed to contact the Membership Chairperson.
2. All sponsored activities must be conducted through the Sponsorship Coordinator.

#### **6.21 Postsecondary Education Liaison (a discretionary appointment)**

The Postsecondary Education Liaison serves as the Association resource on issues relating to the Alabama Department of Postsecondary Education. The Postsecondary Education Liaison shall be responsible for:

1. Soliciting from the Postsecondary Education Department information relating to Association programs and services.
2. Recommending to the President and/or the Executive Board issues that need to be addressed.

#### **6.22 State Agency Liaison (a discretionary appointment)**

The State Agency Liaison serves as the Association resource on issues relating to the Alabama Commission on Higher Education. The State Agency Liaison shall be responsible for:

1. Soliciting from the Alabama Commission on Higher Education information relating to Association programs and services.
2. Recommending to the President and/or the Executive Board issues that need to be addressed.

#### **6.23 Webmaster (a discretionary appointment)**

The Webmaster is responsible for placing and updating information contained on the official Association website – <http://www.aasfaaonline.org/> -- as requested by officers, committee chairs, and liaisons.