

# **POLICIES & PROCEDURES**

## **WEST VIRGINIA ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS**

**UPDATED January 2017**  
By Candi Frazier

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## **ADJUSTMENTS TO POLICY AND PROCEDURES**

Any policy adjustment or new policy must be presented in writing at the Executive Committee Meeting to the chairperson the Policy and Procedures Committee. Revisions to such policy will be posted as soon as possible on the WVASFAA website (Effective 03/26/08)

## **TAX EXEMPT STATUS**

On May 20, 1986, WVASFAA was granted tax-exempt status from the Internal Revenue Service.

## **ASSOCIATION PROPERTIES**

Certain material items are the property of WVASFAA, Inc. and are retained as such. Persons specifically assigned responsibility for these items are to ensure that the items are maintained in good condition and used solely for the purposes for which they are intended as specified below.

### **GAVEL**

The gavel is housed by the President and is used at meetings and conferences.

### **BANNER**

The WVASFAA banner is housed by the President and is displayed at meetings and conferences.

### **COMPUTERS**

The two laptop computers are to be housed by the Treasurer and Secretary and are brought to meetings and conferences. WVASFAA doesn't have any computers – computers were retired or donated to charity (noted January 4, 2017).

### **PRINTER**

The printer is to be housed by the Treasurer and is brought to meetings and conferences. WVASFAA doesn't have a printer – the printer was retired (noted January 4, 2017).

### **MAILBOX KEYS**

The Association has two mailbox keys. The keys are housed with the Treasurer and the President or the President's designee.

### **CAMERA & ARCHIVED ITEMS ON CD**

The camera is to be housed by the Archives chairperson and is brought to meetings and conferences. The CDs (two copies) of all items archived housed with the Archives chairperson and the President.

### **ROBERT'S RULES OF ORDER**

Robert's Rules of Order is to be housed by the President-Elect and is brought to meetings and conferences.

## **WVASFAA CONFERENCE & TRAINING POLICIES**

### **CONFERENCE & TRAINING OPPORTUNITIES**

As a cost saving measure the conference and training opportunities will be a full fall conference and spring training consisting, but not limited to training from Department of Education, State Programs (HEPC), etc. The training will be held at a state school with no lunch provided – effective July 18, 2008 Executive Meeting.

To mirror current practice it was voted and passed that effective March 19, 2015 – WVASFAA will hold at least 2 full conference per year, one in the fall and one in the spring.

### **WAIVER OF REGISTRATION POLICY**

Persons attending the conference, including executive committee members and elected officers (Update on 6/15/07 to state with the exception of the WVASFAA President), will pay the conference registration fee. Guest speakers may have the registration fee waived.

### **LATE REGISTRATION FEE POLICY**

Effective December 10, 2010 – A late fee will be charged for conference registrations submitted 2 weeks prior at the rate of \$25 regular members and \$50 for associate members and if vendors cancel less than 30 days before conference they forfeit 50% of the vending fee.

### **GIFTS AND AMENITIES**

It is customary and acceptable to provide gifts to special guests of the Association or to persons to whom the Association chooses to pay special tribute. Generally, gifts will not exceed a cost of \$25 each.

### **WVASFAA RESERVE FUND**

In March, 1987, the executive committee established a contingency fund of \$6000 for conference expenses and any emergency needs. Updated on March 26, 2008 – line item to WVASFAA budget will be added titled conference reserve and will not exceed \$12000. Originally known as contingency fund with no line item in budget.

### **CONFERENCE EXHIBITOR FEES**

In April, 1996, it was passed to raise the exhibitor's fee to \$125 per conference, which does not include the conference registration fee. In June 2002, the vendor exhibitor fee was increased to \$500 and does not include any conference registration fee. Updated on June 15, 2007, the exhibitor's fee was increased to \$2000 for the year. Updated on July 18, 2008 to \$750 per conference. The exhibitor fee for a short (2 day) conference is \$450, updated on April 23, 2014. The registration fee for an associate member not exhibiting is \$450. Updated on June 10, 2009 to \$750 with only one conference registration and all associate member pay membership fees. Updated December 10, 2010 - Associate members not vending be charged \$250 conference registration fee. Effective April 23, 2014 – it was voted to include a banner ad as part of the exhibitor fee.

## TRAVEL

A policy was approved on November 17, 1996 that WVASFAA will cover all costs to send the WVASFAA President to the NASFAA conference and continue to pay for the WV suite at the MASFAA conference. The decision was based upon the fact that most institutions will cover MASFAA costs while few can afford NASFAA.

WVASFAA will pay expenses for two WVASFAA representatives to attend the NASFAA Leadership Conference.

UPDATED 06/15/07 – If president's institution pays for their MASFAA Conference expenses then WVASFAA could cover costs to NASFAA.

UPDATED 06/15/07 – WVASFAA will cover all expenses for the WVASFAA President for both the fall and spring conferences

Effective 06/15/07 – WVASFAA will cover the conference and registration fee expenses for the WVASFAA President, MASFAA President, MASFAA State Exchange attendee and special guest speakers. Complimentary rooms will be distributed in like manner (WVASFAA President, MASFAA President, MASFAA State Exchange attendee and guest speaker(s)).

## MASFAA ETHNIC MINORITY SCHOLARSHIP

In March, 1987, MASFAA requested that each MASFAA state consider supporting a professional scholarship for an ethnic minority to attend the MASFAA conference. WVASFAA endorsed this suggestion.

## NASFAA TRAINING MATERIALS

In March, 1988, it was approved that WVASFAA would not charge for NASFAA materials or workshops. It was noted that after July 1, 1988, NASFAA training materials are to be provided for paying WVASFAA members. CLARIFIED on October 23, 2007 at the Executive Council Meeting to provide one free set of NASFAA training materials to **each institution. Individuals attending NASFAA Training do not have to pay** WVASFAA membership fees to attend the training.

## WVASFAA EXECUTIVE COMMITTEE RETREATS

It was approved in February, 1996, that the current WVASFAA President will be allowed to spend up to \$1000 for retreats and to have the event in the location of the President's choice. In June of 2006, it was moved and passed that the limit of \$1000 be removed.

## PHEAA APPROVED AS STATE GUARANTEE AGENCY

PHEAA was endorsed as the guarantee agency for West Virginia at the 10/9/91 business meeting.

## **WVASFAA SERVICE AWARDS**

### **YEARS OF SERVICE AWARDS**

In November, 1994, it was approved that the Association recognize members with 20, 25, and 30 years of service.

Members with 20 and 25 years of service will be awarded a certificate and those with 30 years will be awarded a plaque (1/2005).

For the purposes of awarding, "years of service," shall be calculated by years of service in financial aid in general as of July 1 of the previous year; a person receiving a years of service award must be a current WVASFAA member (3/05).

In April 2010, the policy was amended that we don't actually stipulate an item and leave that to the discretion of the awards committee. We can do a certificate at 20 years of service and a recognition gift at 30 and 40 years of service at the discretion of the awards committee with an amount not to exceed \$50.00 (4/2010).

In April 23, 2014 at the Executive Committee Meeting, it was voted to change the amount to not to exceed \$25.

### **RETIREMENT AWARDS**

There will be a cap on the retirement gifts of \$100 (1/2005). Any person retiring during the academic year, i.e. July 1-June 30 will be honored at the spring conference which falls within that academic year (2/2006).

## **ASSOCIATION RELATED COSTS PAID BY MEMBER'S INSTITUTION**

In June, 1989, it was approved that individual institutions should not absorb Association related costs (i.e., copying, postage, etc.). Policy is that institutions be required to turn in their expenses to the Association for reimbursement. Refer to reimbursement form.

## **ASSOCIATE MEMBER SPONSORSHIP ISSUES**

### **REFUND POLICY**

Full refunds will be given to exhibitors up until seven days prior to the beginning of the executive committee meeting occurring before a conference.

Effective December 10, 2010 – A late fee will be charged for conference registrations submitted 2 weeks prior at the rate of \$25 regular members and \$50 for associate members and if vendors cancel less than 30 days before conference they forfeit 50% of the vending fee.

The exhibitor fee was increased from \$500 to \$2000/year (06/15/07). Updated on July 18, 2008 to \$750 per conference. The exhibitor fee for a short (2 day) conference is \$450, updated on April 23, 2014. The registration fee for an associate member not exhibiting is \$450. No other additional sponsorship activities are available.

### **ONLINE BANNER ADS**

Online banner ads may be purchased to be displayed on the WVASFAA website which will rotate on every page except the homepage. The ads will cost \$500. The fee is non-refundable. Ads will rotate on the website and the deadline for submission is November 1 each year. (06/15/07) The ads will run from fall conference to fall conference. There will be no more than 10 ads rotating on the website. WVASFAA will pay a \$300 annual set up fee for all ads submitted same time. No other online banner ads will be available as part of the exhibitor fee. Ads may be changed at the expense of the ad owner.

Effective April 23, 2014 – it was voted to include a banner ad as part of the exhibitor fee.



## **MEMBERSHIP ISSUES**

### **MEMBERSHIP DUES AND MEMBERSHIP YEAR**

A paid membership year for each individual shall run from November 1 through October 31 (10/2006). Effective July 1, 2015, a paid membership year for each individual shall run from July 1 through June 30. Membership fee increased at the July 18, 2008 from \$30 to \$50 per year.

### **LIFETIME MEMBERSHIP**

In June 2002, the Lifetime Membership Application was approved. In order to be considered for Lifetime Membership an applicant must:

1. Made a major contribution in the field of financial aid.
2. Have had some connection with WVASFAA and shown exemplary service to the Association.
3. Not be a paid WVASFAA member (REMOVED as of 2/07)
4. The executive committee must approve the application and voting will be done by secret ballot
5. Addition in 06/06 - Current regular and associate members are not eligible for lifetime membership (REMOVED as of 2/07)

## **EXPENSE REIMBURSEMENT POLICY**

For Executive meetings the evening prior to the official start of the WVASFAA Conference - WVASFAA will reimburse ½ the cost of a room at double occupancy rate for the night of the executive committee meeting if the committee member is attending the conference. If the committee member is only attending the executive committee meeting and not the conference, the committee member is responsible for full cost of room and any other costs incurred. (Effective 2/1/08)

For Executive meeting not associated with a conference - WVASFAA will reimburse for mileage (at the current state reimbursement rate 06/06), meals, airfare, lodging, or registration fees (re: Leadership Conference) the meeting (refer to below for guidance):

Mileage - Mileage will be reimbursed at the current state rate per mile traveled when using a personal vehicle. Parking cost will be reimbursed in addition to the basic mileage rate.

Airfare - When distance and time require air travel, WVASFAA will reimburse the actual air fare. Ground transportation from the airport to the meeting destination and back will also be reimbursed, as will airport of origin.

Meals - Meals not covered by registration fees will be reimbursed at the WV state policy. Refer to <http://www.state.wv.us/admin/purchase/travel/> (Effective 2/1/08) Exception: WVASFAA President, when traveling out of state, will adhere to the current MASFAA meal reimbursement policy (Effective 2/1/08).

Lodging - Lodging will be reimbursed at the actual room rate charged by the hotel for double occupancy rate.

Registration Fees – Registration fees will be covered only in those instances when the member would not otherwise have attended the meeting (i.e. attendance at the NASFAA Leadership Conference).

## **SPECIAL COST**

The following expenses will be covered by WVASFAA:

- Printing
- Postage
- Supplies
- Telephone toll charges
- Speaker/Honorarium
- Meeting Rooms

## **REIMBURSEMENT PROCEDURES**

Reimbursement must be made through the use of a reimbursement form. Form is available at [http://www.wvasfaa.org/docs/toc\\_forms.html](http://www.wvasfaa.org/docs/toc_forms.html). The form must be completed by the member requesting reimbursement as soon as possible but no later than 60 days of incurring the expense. The form must be signed by both the member and the appropriate committee chairman or President. Once the form is signed, it should be forwarded to the Treasurer.

## **FINANCIAL AID TRAINING FOR COUNSELORS**

A policy was approved in February 1984, that each site sponsoring a school counselor workshop be encouraged to absorb as much of the cost as fiscally possible, but that they may request reimbursement up to \$200. In November 2001 it was amended that reimbursement for school counselor workshop would be up to \$500. In March 2003, it was clarified that every attempt would be made to find member schools in all areas of the state. If no member school could be identified, then non-member schools would be given the opportunity to host a workshop and would be permitted to request reimbursement up to \$500. As a cost saving measure the reimbursement for the school was capped at \$100 in the July 18, 2008 executive meeting. Effective July 8, 2015 – it was approved to increase the amount of reimbursement for the school to up to \$350 and a limit of 12 schools.

Effective October 27, 2015 – it was approved that all host institutions will be responsible for setting the agenda according to the directive of the Financial Aid Counselor Chair to cover all aspects related to financial aid and will not include promoting their own institution, or give information pertaining to admissions and/or academic affairs at their institution." Added to the amendment was to change the title of the section to Financial Aid Counselor Workshops.

Effective October 27, 2015 after the above motion was approved – it was approved to change the name to Financial Aid Training for Counselors.

## **WVASFAA PERMANENT ADDRESS**

In January 1986, it was suggested that the Association have a permanent address for business purposes and to have an address that is not affiliated directly with a particular institution. Charleston was selected where someone at the Higher Education Policy Commission would be responsible for rerouting the mail to the appropriate person(s) (UPDATED 03/26/08 – Treasurer and the President or the President's designee will be responsible for picking up and distributing mail. The official address for WVASFAA is: WVASFAA, PO Box 5052, Morgantown, WV 26507 (UPDATED 03/14).

## **WVASFAA SCHOLARSHIP**

In order to increase attendance at financial aid workshops, in June 1993, it was approved to create a \$500 WVASFAA sponsored scholarship (application available at [www.wvasfaa.org](http://www.wvasfaa.org)). At the end of each presentation conducted by a WVASFAA member, a name is to be drawn and submitted to the WVASFAA President to be put in for a statewide drawing later at the spring conference. The student, parent or guardian must be present at the end of each workshop to qualify. Information to be forwarded to the President should include name, address, college selection and other pertinent information. The student must plan to attend a public or private college, technical education center or proprietary school in West Virginia. In March 2001, it was approved to offer two \$500 WVASFAA sponsored scholarships. The second scholarship will be known as the Nathaniel "Nate" Jackson Memorial Scholarship named after the 1975-76 WVASFAA President. In June 2005, it was decided that WVASFAA would add two additional scholarships for a total of four, and that the state would be divided into four regions, with one student being selected from each region. The student's high school will determine into which regional drawing the student will be included.

Effective 06/15/07 – to name a scholarship suggestions are given to the Awards Committee chair to forward to executive committee for approval. As a cost saving measure, WVASFAA scholarships were discontinued at the July 18, 2008 Executive Meeting.

## WEBSITE

It was agreed that in order to ensure continuity of website development the Past President and the Web Committee Chair would monitor and set web policy. In April 2006 the following web policy was adopted. The primary purpose of the WVASFAA Website ([www.wvasfaa.org](http://www.wvasfaa.org)) is to be a reference and resource tool for WVASFAA members. The site should maintain the focus of providing timely Association information and financial aid news for its members. The site should also take advantage of current technology offering electronic/interactive tools (such as online forms or registrations). A secondary purpose of the Website is to provide resources for non-members, parents, and students seeking information on financial aid. Every effort will be made to ensure the Website reflects the Association's mission and goals. The President, Past-President, Elected Officers, Site Chair and Program Chair shall be granted access to the Web Administrative Services area of the website. The Exhibitor's area of the website will list those companies who have provided sponsorship at the most recent conference, if logo is provided.

## WVASFAA Listserv

(EFFECTIVE 0207) The WVASFAA Listserv is intended as an efficient method for WVASFAA members to quickly disseminate relevant information to fellow WVASFAA members. The listserv is a mass mailing list of WVASFAA members who have paid membership dues for the current year. This means that you can send an email message to a single email address, and have it received by everyone who is currently a WVASFAA member. You must be a "paid" member in order to send messages to the listserv.

**IMPORTANT:** The listserv is for current WVASFAA members and is updated regularly as membership changes. If you have paid for membership with WVASFAA and are not receiving listserv messages, or you are having difficulty posting messages to the listserv, email [support@wvasfaa.org](mailto:support@wvasfaa.org).

Because of the nature of the listserv, you should be cautious about the types of messages you send to it. Any message you send to the listserv should be relevant to the administration of financial aid or to upcoming WVASFAA activities. Never send virus warnings, jokes, chain letters, or personal messages via the listserv. Because we have many members currently subscribed to the listserv, irrelevant messages are an annoyance. If you have questions about appropriate content for listserv messages, please email [support@wvasfaa.org](mailto:support@wvasfaa.org).

The WVASFAA Listserv is available for use by WVASFAA members. To post a message to the list, go to: <http://www.wvasfaa.org/ListLock/drop/ListLock.html>. You will need your Username, Password and current membership. *Please read the following before proceeding.*

**New security features have been put in place to prevent the spread of viruses and spam.** Please take time to read about the new ListLock system.

- ListLock was developed as a result of thousands of requests from individuals and institutions whose servers and email were being bogged down by unsolicited spam and virus messages. Institutions have been forced to put stringent restrictions on incoming mail, including rejecting mail with any type of attachment. ListLock addresses those issues.

- All messages will be posted through the ListLock Submission interface, requiring your Username, Password and current membership.
- Only text messages will be distributed to the list, eliminating the problem of many institution's servers rejecting messages with attachments. Follow the simple instructions for complete the submission form.
- To share any files that would normally be included as an attachment, please complete step 2 (optional). Your .doc, .pdf, .rtf, .jpg or .txt file can be uploaded by browsing your computer and locating the file. A link to the uploaded file will be automatically included in your email message to the list. The uploaded file will be available for 10 days.
- When a person receives your message, they can click on the link to view the uploaded file, which can be saved on a person's computer by using their browser's "save as" option.
- **Only messages posted through ListLock will be distributed to the listserv.** For security, emails sent directly to the list or replies to the list will be automatically discarded.
- Note: The time until your message actually posts to the list is dependent on the number of messages in the queue on the server. At peak times there may be delays.
- If you need assistance, contact [support@wasfaa.org](mailto:support@wasfaa.org).

**JOB DESCRIPTIONS  
FOR  
THE EXECUTIVE  
COMMITTEE**

## **EXECUTIVE COMMITTEE DEFINED**

Elected officers and committee chairs as appointed by the President shall constitute the executive committee (10/06).

## **JOB DESCRIPTION FOR THE PRESIDENT**

- Presides at all meetings, chairs all executive meetings which are usually the Fall Conference, Spring Conference, Winter Retreat and the Transition meeting.
- Official representative and spokesperson of Association.
- Appoints committee chairs and task forces with approval of Executive Committee at Transition meeting.
- Distributes job descriptions to committee chairs at Transition meeting.
- Serves as state delegate to MASFAA and as such, is expected to attend all MASFAA Executive Board Meetings.
- Works with the President-elect to plan Winter Retreat.
- Writes an article for each issue of MASFAA and WVASFAA newsletters, directories, conference programs and school counselor packets.
- Schedules and notifies members of committee meetings.
- Prepares President reports as well as receiving association mail and sharing it with members.
- Appoints Program and Site Committee Chairs for the fall conference
- Submits correspondence and annual report to Archives Chair.
- Selects recipients of Presidential and Meritorious Service Awards.
- Collect entries and select scholarship recipients.
- Reviews final conference bill with Site Chair and Long Range Planner before submitting to Treasurer for payment.
- Maintain other mailbox key.
- Performs other duties as needed and as prescribed by Executive Committee.

## JOB DESCRIPTION FOR THE SECRETARY

- Attend and take minutes at all Executive Committee meetings. Typically, there are four per year.
  - One in conjunction with the Fall Conference
  - A Winter Retreat/planning meeting. (Usually 2 days in February.)
  - One in conjunction with the Spring Conference
  - Transition meeting usually the end of June
- Attend and take minutes of all Business Meetings (full membership meetings.) Typically, there are two per year, one at each conference.
- After each of the above meetings, the secretary should type the minutes within two weeks. Send one copy to the President for his/her approval. The President should respond within 2 weeks. After approved by the President, the secretary makes enough copies for the next meeting of the appropriate committees. Currently, Executive Committee attendance is around 25, while Business Meeting minutes require approximately 125 copies, which are placed in conference packets for anyone attending a conference.
- Maintain the supply of all stationary products for the association. Maintain a copy of all official Executive Committee and Business Meeting minutes, along with all written committee reports that are submitted at the various meetings.
- The Secretary, during his/her tenure, is responsible for holding and securing records of past meetings and may be asked to research past minutes for information pertinent to past or present Association business.
- If the Secretary is unable to attend regularly scheduled meetings and there is no one appointed to act as Secretary, he/she should, as early as possible, make arrangement for another WVASFAA member to take them in his/her place and notify the President.
- For the transition meeting, the current secretary will take minutes while working with the new Secretary to train them. The old secretary will complete and type the minutes and send them to the new secretary for review and distribution. At the transition meeting, the current secretary passes all of the official WVASFAA minutes, correspondence and the laptop to the new secretary.
- Forward any appropriate documentation to the archive committee chair as the end of their term



## JOB DESCRIPTION FOR THE TREASURER

- Collect all monies due the organization.
- Pay bills within 30 days of receipt.
- Keep appropriate accounting records.
- Maintain Association mailbox including paying mailbox fee and picking up and distributing mail
- Maintain WVASFAA business license
- Prepare a treasurer's revenues and expenses report for all meetings, executive committee and regular membership.
- File a federal tax return annually.
- Prepare a projected revenues and expenses budget for the coming year (presented at the summer transition meeting).
- Have books audited at the end of the fiscal year and provide results to executive committee.
- Maintain WV tax exempt status and give copy of tax-exempt status form to all current executive committee chairs and officers at transition meeting. Remind MASFAA of the tax-exempt status as needed.
- Responsible for bringing association laptop computer and printer to all conferences and meetings.
- Responsible for forwarding information on paid members to membership and web chairs as dues are paid.
- Prepare profit/loss statement for each conference.
- Collect all registration fees at registration at conference in conjunction with membership chair.
- Maintain the official membership roster.
- Forward any appropriate documentation to the archive committee chair as the end of their term

### **JOB DESCRIPTION FOR ASSOCIATE MEMBER REPRESENTATIVE**

- Will serve as the liaison between the regular and associate membership.
- Will ascertain and disseminate pertinent information on behalf of the associate membership.
- Will assist the long range planning committee with the conference site/program committees.
- By preparing request for exhibitor letter by August 1<sup>st</sup> each year and distributing it to exhibitors either in paper or electronic format (including updating website)
- Responsible for sending out invoices/confirmations to exhibitors and forwarding to the Treasurer.
- Will be responsible for preparing a slate of nominated individuals for the associate member representative-elect to be circulated to the associate members of the association with the announcement of the fall meeting.
- Forward any appropriate documentation to the archive committee chair as the end of their term

## **JOB DESCRIPTION FOR THE PAST PRESIDENT OF WVASFAA**

- Serves in advisory capacity to the Executive Committee and represents the Association in an official capacity when the President or President-Elect is unable to do so, per the WVASFAA Constitution.
- Works with Web Committee to develop and monitor web policy.
- Forward any appropriate documentation to the archive committee chair as the end of their term
- Other duties as requested by the President or Executive committee.
- Chairperson of Nominations Committee.
  - Solicit nominations for the regular member elections of the Association.
  - Coordinate ballot with the Associate Member Representative.
  - Finalize ballots for election held by the Association and submit to Web Chair for inclusion on WVASFAA website or send paper ballots to membership
  - Notify membership of voting as directed by Constitution and By-laws.
  - In the event of paper ballots the Past-President, President and Treasurer, count the ballots and determine the winners.
  - In the event of on-line voting, the Past-president will notify the membership of the decision either via email or during an association business meeting.
  - In the event of paper ballots moves motion that ballots be destroyed at the next conference following the voting as per the constitution.

### **JOB DESCRIPTION FOR PRESIDENT-ELECT**

- Serves as Program Committee Chair for the Spring Conference.
- Serves as Parliamentarian for the Association and is responsible for the Robert's Rules of Order Manual.
- Schedules Executive committee Winter Retreat at location preferred by the President. With President, coordinates present and future planning activities. Presents goals and objectives for upcoming year.
- Selects Committee Chairs for their term of office, submits to Executive Committee for approval.
- Performs all of the duties of the President in the absence of or at the request of the President.
- Any other duties as assigned by the Association or the President.
- Forward any appropriate documentation to the archive committee chair as the end of their term

### **JOB DESCRIPTION FOR ASSOCIATE MEMBER REPRESENTATIVE-ELECT**

- Will assist the associate member representative with the duties of the office.
- Will perform all duties of the associate member representative in the absence of or at the request of the associate member.
- Forward any appropriate documentation to the archive committee chair as the end of their term

# **COMMITTEE JOB DESCRIPTIONS**

### **JOB DESCRIPTION FOR ARCHIVES CHAIR**

- Coordinate the collection of yearly archives for WVASFAA
- Assure that items are either saved electronically or housed in a safe area

## **JOB DESCRIPTION FOR AUXILARY CHAIR**

- Serve as an advocate and bring forward issues to the Executive Committee from Auxiliary committee members
- Report any Auxiliary member issues to the executive committee or during regular WVASFAA business meetings.



## **JOB DESCRIPTION FOR AWARDS COMMITTEE**

- Determine the following awards to be given by the association:
  - Retirees - info obtained from membership
  - Years of service: 20, 25, 30 - info obtained from Treasurer
  - President's Award - info obtained from President
  - Meritorious Service Award - info obtained from President
- Obtain plaques and/or certificates for recipients.
- Obtain gifts for retirees.
- Refer to WVASFAA Awards section of Policy and Procedures for further information
- Naming scholarships/awards – awards committee chair will bring any suggestions for naming of scholarships to the executive committee for final approval. (06/15/07)
- Forward any appropriate documentation to the archive committee chair as the end of their term

### **JOB DESCRIPTION FOR AWARENESS COMMITTEE**

- Contact Governor's office in early November to request the proclamation of Financial Aid Awareness Month
- Contact WV Higher Education Policy Commission to obtain the financial aid figures for the past years.
- Develop publicity (i.e. memo, posters, etc.) to send to WV High School Counselors about financial aid and the awareness month activities. Mail in late December or early January.
- Contact coordinator of teleconference (if one is to be held) to obtain information about where and when the program will be aired to include in memos.
- Write a memo or email to regular association members about the proclamation and awareness month activities. Mail these in late December or early January.
- Send Governor's Proclamation and copies of the correspondence, public service announcements, news releases, poster and memos to the WVASFAA President.
- Forward any appropriate documentation to the archive committee chair as the end of their term
- May be asked to coordinate hot lines. If so:
  - Determine where and when the stations will open.
  - Select a person at each place to get volunteers and take care of the details as site coordinator.
  - Develop a form to use to compile hot lines statistics. Mail it to each site coordinator and tabulate results for assessment.

### **JOB DESCRIPTION FOR CONSTITUTION AND POLICY AND PROCEDURES COMMITTEE**

- Maintain and update the current Policies and Procedures Manual after each Executive and Business Meeting.
- Update reimbursement form when needed and send to President and web committee to put on web.
- Using proposals from executive committee, revise parts of constitution/or bylaws. Write up, get reviewed and approved and mail to members at least 30 days prior to vote.
- Observing constitutional regulations on time lines and procedures, distribute to membership for voting.
- Send updates to web committee.
- Provide the President-Elect with a list of current job descriptions to give to his/her committee members.
- Forward any appropriate documentation to the archive committee chair as the end of their term

### **JOB DESCRIPTION FOR FINANCE COMMITTEE**

- Prepare report, comparing income/expenses for each conference. Present to Executive Committee at yearly retreat and transition meetings.
- Prepare analysis of yearly expenses by category. Maintain spreadsheet to contain last three years' expenses.
- Prepare yearly budget based on information obtained from committee chairs.
- Prepare analysis of budget actual expenses. Present to Executive Committee each time it meets.
- Forward any appropriate documentation to the archive committee chair as the end of their term

### **JOB DESCRIPTION FOR GOVERNMENT ISSUES COMMITTEE**

- If requested, serve on MASFAA Government/Federal Issues Committee.
- Write articles for newsletter on any updates.
- Comments on proposed (federal or state) legislation and reports to Executive Committee.
- Forward any appropriate documentation to the archive committee chair as the end of their term

### **JOB DESCRIPTION FOR LONG RANGE PLANNING COMMITTEE**

- Contact locations suggested by the Executive Committee for upcoming conferences.
- Work with President in the final location selection which is approved by Executive Committee.
- Negotiate terms of the contract (including reserving both conference and hotel rooms, meal and room pricing, gratuity and etc.). Sign contract at least 9 months in advance for each conference/meeting and notify membership of the location in newsletter and on website.
- Serve as a member of both site and program committees.
- Notify conference location contact of the site committee chair(s) who will be the liaison for the conference.
- Provide conference location with WVASFAA tax exempt form.
- Review final conference bill with President and Site Chair before submitting to Treasurer for payment.
- Forward any appropriate documentation to the archive committee chair as the end of their term

### **JOB DESCRIPTION FOR MEMBERSHIP COMMITTEE**

- Chairperson willing to serve several years.
- Membership renewal applications should be sent to members 60 days prior to the end of the membership year, preferably with the fall conference information. Applications should be included in newsletters and posted on the WVASFAA website.
- Send follow up membership request (either electronic or paper) after the fall conference to any previous member (within the last two years) who has not renewed his/her membership.
- Serve as a recruiter for WVASFAA.
- Work to retain members and recruit former members.
- Submit end of year final membership list to Archives Chairman.
- Work registration table with Treasurer and Site committee.
- Forward any appropriate documentation to the archive committee chair as the end of their term

### **JOB DESCRIPTION FOR NASFAA TRAINER**

- Attend training of trainers offered by NASFAA.
- Provide training to Association at conferences as determined by the program committee.
- Other training needs as determined by the executive committee.
- Forward any appropriate documentation to the archive committee chair as the end of their term



### **JOB DESCRIPTION FOR NEWSLETTER COMMITTEE**

- Establish newsletter publication calendar.
- Determine and publicize deadlines for information.
- Gather information for newsletter articles.
- Edit information and submit to listserv.
- Determine who receives a copy of newsletter outside of WVASFAA membership.
- Forward electronic copy of each newsletter to the Web Chairperson to be placed on WVASFAA website.
- Forward any appropriate documentation to the archive committee chair as the end of their term

### **JOB DESCRIPTION FOR PROFESSIONAL DEVELOPMENT**

- Devise event at each conference for newcomers. For example: session on how to get involved, time management, basic skills of financial aid 101, newcomer's gift and etc.
- Determine if other professional development is needed for Association and work with Program Committee to include session(s) at conference.
- Coordinate mentor for new members with senior Association members.
- Send follow up letter to newcomers after each conference.
- Forward any appropriate documentation to the archive committee chair as the end of their term

## **JOB DESCRIPTION FOR PROGRAM COMMITTEE**

- Develops the conference program.
- Helps in the development of a conference theme with Site Committee.
- Identifies possible sessions and possible speakers (Current MASFAA President should always be invited to at least one conference per year and will speak at one of the general meal sessions). Request from President MASFAA Exchange Person and contact person to determine any sessions that Exchange Person would be doing. Notify Site of MASFAA Exchange person (provide room and registration).
- Invites speakers by first calling and following up with written confirmation.
- Determines AV needs for each speaker and forwards that information to Site Committee.
- Writes description on each session to be included in the program.
- Identifies moderators for each session.
- Establish meal and break times.
- In conjunction with the Site Committee, prepare conference promotion with tentative agenda, hotel reservation information and registration process approximately 45-60 days prior to the conference. Either mail or email this information to current members. Request from Web Committee that conference promotion be put on the website.
- Obtain mailing labels or request that an email be sent concerning the conference from the President/Treasurer to previous WVASFAA members.
- Prepare and print final program 10 days to 2 weeks prior to meeting.
- Prepare packets at Executive meeting: Conference Program, Treasurer's report, evaluation, and Secretary's minutes. Should have at least 130-150 of each.
- Send thank you notes to presenters.
- Forward any appropriate documentation to the archive committee chair as the end of their term

### **JOB DESCRIPTION FOR PROMOTIONAL COMMITTEE**

- Develop ways to promote WVASFAA to the citizens of the State of WV by using radio, computer, television, print ads, political contacts and etc.
- Work closely with the Awareness Committee.
- Forward any appropriate documentation to the archive committee chair as the end of their term

## **JOB DESCRIPTION FOR FINANCIAL AID TRAINING FOR COUNSELORS COMMITTEE**

- Arrange and coordinate 8-10 training workshops. Have sites established by August 1. Forward information to web committee and email membership of site information.
- Provide printed materials for Financial Aid Training for Counselors Training and disseminate to the site coordinators.
- Create evaluation form for training.
- Forward any appropriate documentation to the archive committee chair as the end of their term

## JOB DESCRIPTION FOR SITE COMMITTEE

- Helps in the development of a conference theme with the Program Committee.
- Is provided by the Long-range Planner, a contact person at the site location.
- Determine conference menu selections for meals and breaks.
- Obtains meal cost information to establish conference fees to present to Executive Committee for approval. Suggest daily rate cost to Executive Committee for approval.
- Arrange for local entertainment.
- Work with Associate member representative on sponsorship sources.
- In conjunction with the Program Committee, prepare conference promotion with tentative agenda, hotel reservation information and registration process approximately 45-60 days prior to the conference. Either mail or email this information to current members. Request from Web Committee that conference promotion be put on the website.
- Obtain mailing labels or request that an email be sent concerning the conference from the President/Treasurer to previous WVASFAA members.
- Prepare name tags/ribbons and packet labels from pre-registration information as close as possible to conference date. Obtain current/accurate label and nametag information from the WVASFAA website 3-5 days prior to the conference.
- Obtain folders for conference packets. Usually obtained from an associate member.
- Develop conference evaluation form.
- Purchase gifts for designated speakers.
- Prepare packets at Executive meeting: Conference Program, Treasurer's report, evaluation, and Secretary's minutes. Should have at least 130 - 150 of each.
- Assign complimentary rooms.
- Make signs for and monitor interest sessions and change signs as needed.
- Obtains head table assignments from President.
- Arrange for audio-visual equipment, speaker transportation, set up for exhibitor areas.
- Gather evaluation forms and given to next site and program chair.
- Reviews final conference bill with President, Long Range Planner before submitting to Treasurer for payment.
- Send thank-you letters to hotel or resort.
- Forward any appropriate documentation to the archive committee chair as the end of their term

## **JOB DESCRIPTION FOR WEB COMMITTEE**

- Maintain WVASFAA website. Some examples of items that need to be updated are:
  - Conference information (state, Midwest and national)
  - Other important events
  - Membership application
  - Officers and Executive committee Information
  - Online Membership Directory
  - Contact information for Government Officials, Vocational Rehab & Higher Education Policy Commission
  - Etcetera
  
- Maintain WVASFAA Listserv
- Serves as a liaison to ATAC
- Explore other means of technology
- If able, serve on MASFAA's Web Committee.
- Work with the Past President to monitor and set web policy upon approval of Executive Committee
- Responsible for printing mailing labels for various WVASFAA events
- Grant access to appropriate committee chairs or elected officers to website information
- Forward any appropriate documentation to the archive committee chair as the end of their term