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**South Dakota Association of Student Financial Aid Administrators**

Policy and ProcedureS

Manual

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# INTRODUCTION

The South Dakota Association of Student Financial Aid Administrators (SDASFAA) Policy and Procedures Manual supplements the Articles of Incorporation and the Association Constitution by providing specific policy guidance and procedures that are required to be used by the members of the Executive Council and committee chairs. It provides an overview of the Association’s structure, describes the responsibilities of members who hold leadership positions, and provides guidance and reference to be used in the conduct of Association activities.

# PURPOSE AND SCOPE

The Manual is designed to provide the Executive Council with easy access to essential information about the policies and procedures that govern SDASFAA. These policies and procedures are intended to further the mission of the Association, ensure fiscal integrity and support the continued viability of the Association.

The Manual defines the general policies of the Association. It is intended as a guide to the officers and committee chairpersons in the effective administration of the activities of the Association and will provide the necessary information about the Association governance to the general membership.

A number of additional benefits are expected from the use of this manual, including greater understanding of Association responsibilities among members, a consistency of interpretation and processes, and a means of familiarizing those members serving in a leadership position for the first time with individual responsibilities as well as the overall role of SDASFAA.

This manual is not intended to include a description of every function of the Association nor of every activity conducted by the Association. This manual is a living document that will change as necessary to fit the Association’s needs.

# UPDATING THE MANUAL

All officers and committee chairs are responsible for identifying areas in need of new or revised policy guidance or procedural change and for recommending changes. The Executive Council must approve all new policies, procedures, and changes. Upon approval, the Secretary incorporates the changes and provides electronic copies to the Executive Council members and the Website Master to update to SDASFAA website.

The manual should be reviewed and updated annually to insure that the goals are constantly revised to reflect the changing needs of the Association or as mandated by the Federal Student Aid Programs. Every five years a thorough review of the manual shall be undertaken by the Executive Council to identify areas needing changes.

PHILOSOPHYThe South Dakota Association of Student Financial Aid Administrators will adhere to the National Association of Student Financial Aid Administrators “Statement of Ethical Practices” for financial aid professionals.

The Association is committed to the belief that no one should be denied access to post-secondary education because of a lack of family resources or a lack of knowledge of the financial aid delivery system or application process. It is a goal of the Association to assist those seeking assistance through federal, state and other resources.

The Association shall serve as a forum for its members and act as a focus for the expression of views on matters relating to the development, funding, and administration of financial aid.

# OBJECTIVES

The South Dakota Association of Student Financial Aid Administrators will conduct workshops to update members on practices and regulations of financial aid. The Association will schedule two (2) events per year, one of which will be the annual Spring meeting to conduct business of the Association. The purpose of these events will be to provide an ongoing dialogue among members, and to provide a meaningful exchange of ideas through the conference format.

The Association will conduct High School Counselor Workshops to educate counselors in the financial aid programs and related changes incurred through congressional action.

The Association will encourage its members to participate in all activities associated with financial aid awareness by participating in seminars, facilitating financial aid nights, making presentations, and coordinating with Admission’s efforts at their institution.

The Association will review legislative proposals affecting the membership. The Association will attempt to educate legislators in the formation of legislation and regulations related to financial aid and in turn inform members of any proposed legislative action. The Association does not prohibit members from responding to legislators on issues that affect delivery of funds to students, or issues facing the Association that will limit their effectiveness.

# PURPOSE

The Association shall be organized as an educational and charitable organization within the meaning of section 501(c)(3) of the Internal Revenue Code. Within the general limitation, the specific purposes of the Association shall include the following:

A. To serve the needs and interests of students, faculties, and administrators of institutions of post-secondary education, as well as individuals and public and private organizations whose activities are related to the support and administration of student financial aid by advising, training, and assisting in the promotion, development and effective administration of student financial aid programs.

B. To promote and facilitate communications between institutions of post-secondary education and the sponsors of student aid funds.

C. To promote and provide education by conducting conferences and any other related activities as are desirable or necessary in fulfilling the purposes of the Association.

D. To promote standards of professional preparation for financial aid administrators, counselors in post-secondary institutions, and other individuals concerned with or engaged in the support and/or administration of student financial aid.

E. To serve as a forum and action body to advise and recommend programs and policies to related agencies (state, regional and national) dealing with student financial aid.

# POLICIES AND PROCEDURES

1. Executive Council Policy

Duties of Officers—The officers shall consist of a President, President-Elect, Past President, Secretary, and Treasurer.

1. President

Including those duties outlined in the Constitution, the President shall:

1. Hold that office for a one-year term commencing January 1st. The President becomes the immediate Past President when succeeded by the election of a new President.
2. Upon installation the President shall provide the association with goals and objectives for the year.
3. Be the principal executive officer of the Association and in general, supervise and control all the affairs and business of the Association.
4. Preside at all meetings of the Association and its Executive Council.
5. Appoint whatever committees are deemed necessary for the proper functioning of the Association.
6. Perform all the duties incidental to the office of the President and such other duties as may be prescribed by the Executive Council.
7. Be a member of the Board of Directors of the Rocky Mountain Association of Student Financial Aid Administrators (RMASFAA) and attend all Board meetings of said organization.
   1. Provide a report of association activities at RMASFAA Board Meetings. If the President is not a member of RMASFAA, then the President is not able to serve as the SDASFAA State Delegate to the RMASFAA board. SDASFAA Executive Council will need to appoint an institutional board member who is a member of RMASFAA to replace the President on the RMASFAA board. With Executive Council approval, the Association will cover delegate expenses not covered by RMASFAA.
   2. At the discretion of the Executive Council, the Association will pay expenses for the state delegate, as referenced above, to attend the RMASFAA annual meeting.
   3. In the event that the President is not able to attend the RMASFAA board meetings, they shall appointment a proxy to stand in their place during that board meeting.
8. Disseminate information as deemed appropriate to the membership via electronic means.
9. Submit a final annual budget to the Executive Council and association for the first Executive Council meeting.
10. At the President’s discretion, may award a Committee of the Year.
11. Conduct a cursory review of the Treasurer’s books and report findings to the Executive Council at the summer board meeting.
12. Serve as a member of the Recognition Committee.
13. Serve as Vice Chair of Spring Conference Committee.
14. President-Elect

Including those duties outlined in the Constitution, the President-Elect shall:

1. Perform the duties of the President in the event of the absence or incapacity of the President to serve. When so acting, the President-Elect shall have all the powers of the President and be subject to all the restrictions upon the President.
2. Perform such other duties that may be assigned by the President or the Executive Council.
3. At the expense of SDASFAA, represent SDASFAA at the NASFAA Leadership Conference prior to assuming the Office of President.
4. Attend all Executive Council meetings.
5. Attend the RMASFAA Board of Directors meetings as state delegate-elect. If the President-Elect is not a member of RMASFAA, then the President-Elect is not able to serve as the SDASFAA State Delegate-Elect to the RMASFAA board. The SDASFAA board will need to appoint an institutional board member who is a member of RMASFAA to replace President-Elect on RMASFAA board. With Executive Council approval, the Association will cover Delegate-Elect expenses not covered by RMASFAA.
   1. At the discretion of the Executive Council, the Association will pay expenses for the state Delegate-elect, as referenced above in (e), to attend the RMASFAA annual meeting.
6. Conduct a cursory review of the Treasurer’s books and report findings to the Executive Council at the fall board meeting.
7. Submit a proposed annual budget to the Executive Council at the fall meeting.
8. Assist the Recognition Committee with the slate of candidates.
9. Past President

Including those duties outlined in the Constitution, the Past President shall:

1. Remain on the Executive Council for one year to assist in carrying out continuing council matters.
2. Perform such other duties from time to time that may be assigned by the President or the Executive Council.
3. In conjunctions with the Membership Committee, review the Constitution and Policy and Procedures Manual and make recommendations when necessary to the Executive Council. Certify that any by-law changes are in accordance with state and or federal regulations governing the Associations corporate status.
4. Conduct a cursory review of the Treasurer’s books and report findings to the Executive Council at the winter board meeting.
5. Serve as Chair of the Recognition Committee.
6. Serve as Chair of the Spring Conference Committee.
7. Secretary

Including those duties outlined in the Constitution, the Secretary shall:

1. Serve a two-year term on the Executive Council.
2. Record minutes of all Association and Executive Council meetings.
3. Post draft minutes to the website within 60 days of any Association meeting with notification of said posting sent to the SDASFAA listserv.
   1. Said minutes will be posted in final form to the website within 30 days of approval by the membership and notice of said posting sent to the membership via the SDASFAA listserv.
   2. All draft minutes will be finalized after the next scheduled corresponding meeting.
4. Be a member of the Executive Council and attend all meetings.
5. Update the Constitution, Policy and Procedures Manual and Executive Calendar as necessary, and submit to the Website Committee for posting to the SDASFAA webpage within 30 days.
6. Conduct a cursory review of the Treasurer’s books and report findings to the Executive Council at the Spring Board meeting.
7. Treasurer

Including those duties outlined in the Constitution, the Treasurer shall:

1. Serve a three-year term on the Executive Council.
2. Maintain complete financial records of the Association.
3. Assist in preparing an annual budget in consultation with the Executive Council and President.
4. Submit fiscal reports to the Executive Council at each meeting and provide financial information when asked.
5. Distribute membership forms and compile a listing of members to be sent to the Membership Committee.
6. Assess and collect membership dues.
7. Pay all bills submitted on a timely basis.
8. Prepare and submit a non-profit corporate tax return if required.
9. Prepare and submit to the Secretary of State an annual non-profit report.
10. Provide information to the Internal Revenue Service as required regarding our status as an educational and charitable organization within the meaning of section 501(c)(3) of the Internal Revenue Code.
11. Prepare information for the Review Committee as necessary for the annual audit.
12. At the expense of SDASFAA, represent SDASFAA at the NASFAA Leadership Conference within the first year of assuming the office of Treasurer.
13. Manage the Association’s funds in a fiscally responsible manner, including transferring funds between checking and savings accounts. Investments in CDs must be made with the Executive Council’s approval.
14. Any newly elected Treasurer has the responsibility to update the signatures on the SDASFAA banking accounts to the Treasurer and the President-Elect or a board member serving a similar term.
15. Collect event registration fees.
16. Executive Council Policy --- Duties of Members-at-Large

Including those duties outlined in the Constitution, the Institutional and Associate Members-at-Large shall:

1. Serve a two-year term.
2. Make recommendations regarding policy and procedural matters to the Executive Council.
3. Perform other duties that may be assigned by the President.
4. Associate Member-at-Large serves as the liaison to the executive Council for all associate members.
5. Associate Member-at-Large will be responsible to sit on the Review Committee.
6. Second-year Institutional Members-at-Large will co-chair the Fall Training Committee.
7. Executive Council Policy --- Meetings
8. The Executive Council will meet up to four times per year. Two of these meetings may be held in conjunction with the Fall Training and the annual SDASFAA Spring Conference. The remaining two meetings will be held at a time that is most convenient for the Executive Council members. The location and times of these meetings will be the decision of the President. Notification of meetings will be given to all members in accordance with the Constitution of the Association.
9. Meeting agendas will be prepared and distributed within fourteen days of each meeting.
10. Regular reports are to be provided by committee chairs. The President or a committee representative can provide these reports.
11. The Executive Council may choose to conduct meetings through use of virtual or conference calls.
12. Committee chairs shall be invited to meetings as determined by the President.
13. Board members, with the exception of the President, if needed, shall not be reimbursed by the Association for travel or lodging expenses incurred while attending Executive Council meetings when these meetings are held in conjunction with the Fall Training or Spring Conference. However, expenses will be reimbursed for other Executive Council meetings, subject to the approval of the President.
14. At the approval of the President, meals may be provided to Executive Council members during meetings.
15. Executive Council Policy --- Primary Responsibilities

The Executive Council, including those duties outlined in the Constitution, shall:

1. Review and adhere to the mission of SDASFAA. The Executive Council is charged with ensuring that the activities of the association remain true to its mission and purpose.
2. Continually review the actions and plans of the officers of the association and other council members to ensure the goals and objectives of the association are being met.
3. Develop and review the long range planning process to ensure association objectives are accomplished.
4. Periodically review the association’s revenue raising rationale, assets, expenses, and expected expenditures to ensure that adequate resources are available to the association.
5. Review corporate support level and membership fees on an annual basis.
6. Manage association resources wisely. The Executive Council shall properly protect accumulated assets and manage current income.
7. Enter into any contracts authorized by the membership.
8. Monitor proposed legislation and regulations and help coordinate SDASFAA responses and encourage individual membership responses.
9. Assist the membership with clarification of proposed legislative and/or regulatory changes.
10. Update the Policy and Procedures Manual as needed.
11. Committee Responsibilities
12. Budget/Expenses

Committees should provide input to the Executive Council for budget/planning purposes. Committee chairs must approve all expenses incurred by their committee members before the Treasurer will process payments.

1. Record of Activities

Committees should maintain a written record of all activities undertaken,including a timeline by which said activities must be completed and/or implemented in order to facilitate accomplishment of committee objectives.

1. Written Report

Committees have the responsibility of submitting a written report at the annual Business Meeting that summarizes the committee activities to date. The report will include an evaluation of the committee for the year, and recommendations for committee use.

1. Committee Structure

All committees will be made up of a Chair and Vice Chair, or Co-Chairs. If the committee has a Chair and Vice Chair, it is the expectation the Vice Chair will take over as Chair the following year. Each committee will have a board member liaison.

1. **Standing Committees**
2. **Review Committee**

The committee shall consist of a minimum of three (3) persons made up of the Associate Member-at-Large from the current Executive Council and two other individuals from the membership to be appointed by the President at the beginning of their term of office. This committee shall contact the Treasurer to coordinate an annual audit of the financial records of the Association and shall report to the membership at the annual business meeting and to the Executive Council at the first meeting of the new year. This committee will be responsible for reviewing the books after the close of the calendar year. This review should take place within the first 3-4 months of the year, if possible, prior to the first Executive Council meeting of the new year. The Treasurer’s books will be audited if there is a change in the office of Treasurer during the course of the fiscal year.

1. Communications and Website Committee

The committee shall consist of a minimum of three (3) persons. The Committee will be responsible for maintaining and updating the SDASFAA website. The Committee will be responsible for publishing the SDASFAA quarterly newsletter. The Committee may host up to two gatherings on Zoom (or other digital resource) each year to promote communication amongst members.

1. **Membership & Records Committee**

The committee is responsible for compiling and maintaining the membership

directory of the Association and forwarding that information to the Communications and Website Committee. The committee shall be responsible for development and solicitation of new members along with following up with any members that have not renewed their annual membership. In conjunctions with the past president, review the Constitution and Policy and Procedures Manual and make recommendations when necessary to the Executive Council. The Committee shall maintain the records of the association by collecting and preserving official association documents, memorabilia, and photographs. The Membership & Records Committee should consist of both institutional and associate members appointed by the President.

1. Recognition Committee

The Recognition Committee shall consist of the Past President as Chair, with the current President and the Past-Past President. The committee responsibilities include the recognition of individual member’s years of service as prescribed by the Association’s policies and procedures for awards. The committee shall obtain nominations for the Douglas Steckler Professional Development Award and the Outstanding Service Award. The committee will select both award recipients. . The committee shall recognize the outgoing executive council members and committee chairs.

The Recognition Committee, with the assistance of the President-Elect, shall solicit nominations for the election of officers from the membership and create a ballot for election by paper or electronic ballot. The ballots should be destroyed at the end of the calendar year of the election.

1. Education Committee

The Education Committee shall be responsible for all state training and education programs. In addition, this committee will provide information to the members on current legislation related to financial aid. The committee shall consist of the following three sub-committees:

* + 1. **Spring Conference Committee**

The Conference Committee responsibilities shall include activities associated

with preparations necessary for the Spring Conference. This committee’s term will run conference to conference instead of calendar year. The President

shall chair this committee with the President -Elect as Vice Chair with at least five other members appointed by the President. (At the time of the conference, the chair and vice-chair would now be Past President and President.)

The Spring Conference Committee responsibilities shall include:

* 1. Selection of conference location with approval by the Executive Council.
  2. Planning the program agenda for conference, including securing and hosting necessary speakers, presenters, and facilitators.
  3. Estimating total cost for purpose of establishing the conference registration fee.
  4. Assisting the Treasurer with collection of all outstanding registrations and sponsorship fees.
  5. Coordination of all facility functions and activities including meal planning, meeting rooms, equipment availability (securing all supportive audio-visual equipment needed by the speakers and presenters), cooperate partner display area, and guest room availability
  6. Coordination and implementation of on-site conference registration.
  7. Submitting all speaker and presenter–related expenses in a timely manner.
     1. **Fall Training Committee**

The Fall Training Committee responsibilities shall include

activities associated with preparations necessary for the annual fall training.

The 2nd-year Institutional Members-at-Large will co-chair this committee with at least three other members appointed by the President.

The Fall Training Committee responsibilities shall include:

1. Selection of conference dates, facility, and contract proposal
   * 1. Contract is then taken to the Board for approval
2. Planning the program agenda for event.
3. Coordinating all necessary speakers, presenters, and facilitators.
   * 1. Training committee is responsible for selecting and coordinating a NASFAA credential topic and at least one other topic
4. Working with SDASFAA President and Board to establish a budget and estimate the total cost for purpose of establishing the registration fee.
5. Assisting Treasurer with collection of all registrations and vendor fees.
6. Coordination of all facility functions and activities including meal planning, meeting rooms, equipment availability (securing all supportive audio-visual equipment needed by the speakers and presenters), vendor display area, and guest room availability, assuring adequate supplies of all other materials associated with the training.
7. Coordination and implementation of on-site registration.
8. Submitting all speaker and presenter–related expenses in a timely manner.

**iii.** Training Committee

The Training Committee responsibilities shall include providing credentialing and training sessions at both yearly conferences, coordinating the High School Counselor Workshops, and other additional training opportunities for SDASFAA. This committee will run from Spring Conference to Spring conference instead of calendar year. The Training committee responsibilities shall include:

1. Choosing the credential topic for both Spring Conference and Fall Training and soliciting a presenter or presenters.
2. Facilitating additional training sessions for both conferences.
3. Coordinating Federal Training sessions when needed.
4. Preparing the necessary materials for the High School Counselor Workshop and soliciting presenters
5. Facilitating the Summer Institute Scholarship each spring by preparing the application form, reviewing the applicants, and selecting the recipient.
6. Meeting of the Association Membership
7. An annual business meeting of the Association shall be held in the spring of each year. Additional business meetings may be called by the President or by the Executive Council. The President shall submit an agenda to each member prior to each scheduled business meeting.
8. Minutes of any scheduled business meeting will be posted to the web site in draft form for membership review within 60 days with notification of said posting sent to the membership via the SDASFAA listserv. Final approval of said minutes will occur at the next scheduled business meeting. Said minutes will be posted in final form to the web site within 30 days of approval by the Association membership and notice of said posting sent to the membership via the SDASFAA listserv.
9. Fund Management
10. The Treasurer will keep the Association funds in an insured account. As a non-profit organization, the Association will maintain a reasonable balance for cash flow as determined by the Executive Council.
11. Accurate records will be kept reflecting the income, expenses, and investments of the Association. Bills will be paid by invoice, cash receipt and/or Reimbursement Form (Appendix A). Any questionable bills must be submitted to the Executive Council for approval. Committee chairs must approve all expenses incurred by their committee members before the Treasurer will process payments.
12. The Treasurer’s books will be audited on an annual basis at the close of the fiscal year (December 31), or if there is a change in the office of Treasurer during the course of the fiscal year. The Review Committee will audit the Association books. They will submit their findings by written report at the annual business meeting.
13. No refunds will be issued for membership dues or sponsorship support.  Requests for emergency exceptions must be submitted to the Executive Council for approval.
14. SDASFAA funds cannot be used for the purchase of alcohol.
15. Expense Reimbursement
16. Expense reimbursement for travel will be paid to the President (as the outgoing RMASFAA Board Member), President-Elect (as the incoming RMASFAA Board Member) or their substitute(s) for the RMASFAA annual conference and for the RMASFAA Board of Directors meeting, held in conjunction with the annual conference. Any other travel expenses may be reimbursed at the discretion of the Executive Council.
17. Mileage using personal vehicle will be at the current South Dakota High Mileage reimbursement rate or actual commercial ticket fare (whichever is less). South Dakota per diem info: <https://sdsos.gov/about-the-office/board-of-finance/bof-perdiem.aspx>.
18. Individuals flying on Association business shall travel by coach class; airfare over $800 must be approved by the President in advance and prior approval must be communicated to the Treasurer. Commercial air transportation will be reimbursed at actual cost. A receipt is required. Air travel reservations should be made as early as possible in order to obtain the lowest rates. Luggage and parking fees will be reimbursed at actual cost. A receipt is required.
19. Rental Vehicle: The President must approve the use of a rental vehicle in advance. If the President is needing to rent a car, the Past President will act as the approving authority.
20. Ground transportation to and from meeting/lodging facilities are reimbursed provided they are reasonable and do not include transportation for activities of personal choice. Actual costs up to a maximum of $10.00 per fare or fee will be reimbursed without receipts. A receipt must accompany any request for reimbursement in excess of $10.00.
21. Reasonable and prudent expenses for lodging are reimbursed at actual cost. A receipt is required. Personal expenses (such as room service, phone calls, etc..) billed to the room are the responsibility of the individual. Any parking costs incurred as a result of a hotel stay can be reimbursed by SDASFAA with a receipt.
22. Meals, including taxes and reasonable tips, will be reimbursed with a receipt. SDASFAA will not reimburse for alcoholic drinks.
23. Travel expenses may be paid up-front by SDASFAA upon request.
24. Members of the Executive Council and other invited guests will have their meal in association with board meetings paid by SDASFAA, subject to the approval of the President.
25. If there are any free rooms granted by a conference site facility, they will be utilized first by a conference presenter for whom SDASFAA is responsible for housing, the President of the Association, and then the President-Elect, in that order.
26. Presenters from outside the Association will be reimbursed for necessary expenses that may include travel, meals, and/or lodging. Members of the Association and/or Department of Education personnel will not be reimbursed.
27. The Association will pay honorariums or consultant fees to presenters whom the conference planning committee deems appropriate for participation at SDASFAA meetings.
28. SDASFAA may send flowers or a memorial in the event of the death of a member or member’s immediate family (parent, spouse or child). Cost of flowers or memorial will be limited to $50.00. For other occasions (birth, marriage, adoption, etc.) cards will be sent by the President at his/her discretion.
29. Conference Registration Fees
30. All Conference participants will pay the listed conference registration fee except non-member presenters. Full payment applies regardless of in-kind services rendered in connection with the conference. Exceptions can be made with approval necessary from the Chairperson of the conference planning committee.
31. Associate members must be a member of SDASFAA to sponsor any event/activity.
32. Awards
33. Awards of recognition for years of service to SDASFAA will be made at 5-year intervals to active institutional and associate members who have been members of the Association for 10 or more years. Credit will be given to members for active non-concurrent membership in another state’s Association, but not until after they have served a minimum of 5 years to SDASFAA (recognition will be given once the combined total meets or exceeds 10 years). Recognition will be made at the association’s annual awards ceremony. Plaques will be given out to institutional and tribal members with the name of the member, years of service to SDASFAA, and the date. Associate members will be verbally recognized. All members will be recognized on the website for years of service awards.
34. Recognition will be given to retiring members at the discretion of the Recognition Committee.
35. Recognition will be given to officers and committee chairpersons at the end of each year.
36. One member will be selected each year to receive the Outstanding Service Award. The member selected for this award must first be nominated from the membership-at-large. The award will be given at each Spring Conference in the form of a plaque. If no one is nominated by the membership, the Recognition Committee may choose to select the recipient.
37. One member will be selected each year to receive the Douglas Steckler Professional Development Award. The member selected for this award must first be nominated from the membership-at-large. The final selection will be made by the Recognition Committee. The award will be given at each Spring conference in the form of a plaque and a $100 voucher to be used for professional development at the recipient’s discretion during the following year. If no one is nominated by the membership, the Recognition Committee may choose to nominate a recipient.
38. Any other recognition must be approved by the Executive Council.
39. Elections
40. Election of officers of the Association will be coordinated and implemented by the Recognition Committee. It is an institutional responsibility to designate one individual eligible to vote, and to ensure that they are included on the membership master list prior to the election.
41. For election purposes, there will be a ballot with nominations allowed from the membership of the Association. The Recognition Committee along with the President-Elect will solicit candidates, tally the votes and announce the results of the election to the Executive Council and the membership.
42. The Executive Council shall replace any position vacated on the Council as outlined in the Constitution. If not specified in the Constitution, the vacancy shall be filled by appointment of the Executive Council.
43. Event Registration Refund Policy
    * 1. All requests for refunds must be submitted in writing and sent to the Treasurer for approval. A 100% refund is granted if the request is received at least 15 calendar days prior to the start of the event. The treasurer will confirm that the fee was received, issue the refund, and notify the committee chair. Due to planning requirements, SDASFAA cannot issue a refund for the registration fee after 15 days prior to the event; however, a substitute may attend in place of the original registrant. A 100% refund may be allowed for medical reasons, death or illness in the immediate family, or for persons who have resigned from their employing institution prior to the start of stated event. Other refunds may be requested on a case-by-case basis at the discretion of the event chairperson or Executive Council. Requests must be received no later than 15 days after the event.
      2. The refund policy and notice must be included on the SDASFAA website registration and on the registration confirmation emailed to the registrant.
44. Event Conduct Policy
45. SDASFAA is committed to providing a safe, productive, and harassment-free environment at its conferences, trainings, Executive Council and committee meetings, and other SDASFAA-sponsored events. SDASFAA prohibits harassment or discrimination based on race, religion, gender, sexual orientation, gender identity, gender expression, disability, ethnicity, national origin, or other protected status. It also prohibits sexual harassment or intimidation, including unwelcome sexual attention, stalking (physical or virtual), or unsolicited physical contact; and threatening behavior.
46. These conduct rules apply to all attendees and participants at any SDASFAA-sponsored event or activity, including electronic communication. Any violations should be reported immediately to a member of the SDASFAA Executive Council; we also expect participants to alert appropriate officials of any dangerous situations or of anyone in distress. SDASFAA reserves the right to remove any individual from attendance or other participation in any SDASFAA-sponsored event without prior warning or refund, and to take additional action as deemed necessary, up to and including termination of membership as outlined in the Constitution.
47. Archiving Policy

SDASFAA materials and records that are older than two years will be archived according to the Title IV record maintenance/archiving policy.

# APPENDIX A – REIMBURSEMENT FORM

SDASFAA Reimbursement

TO: SDASFAA Treasurer

FROM: DATE: RE: REIMBURSEMENT FOR EXPENSES INCURRED FOR SDASFAA

Date(s) of incurred expenses:

Committee or activity:

Itemized list of expenses: (receipts attached)

Please make check payable to:

|  |  |
| --- | --- |
| Mail check to: |  |
|  |  |
|  |  |
| Submitted by: |  |

Approved by: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

SDASFAA Check #: Date of Check:

Return to: \_\_\_\_\_\_\_\_\_\_, SDASFAA Treasurer

Campus or Location

Address

City, SD Zip code

Fax: 605-XXX-XXXX

# APPENDIX B – CORPORATE SUPPORT FORM



**SD Association of Student Financial Aid Administrators Annual Corporate Support Invoice**

December 15, 20XX

Greetings! It is time to renew your membership to SDASFAA!

Corporate support is critical to the operation of SDASFAA. If your organization has supported SDASFAA in the past, we sincerely thank you! If your organization is considering supporting SDASFAA for the first time, we welcome and very much appreciate your support and involvement! Below, please find a breakdown of the ways you can financially support our efforts and gain recognition for your organization within the SDASFAA membership. Membership dues are required by any corporate organization wanting to be a member of SDASFAA and participate in organization functions. Please place a check mark beside each area(s) of financial support that (name of associate member) will contribute to SDASFAA for 20XX. Please note that we are unable to permit refunds of membership dues or sponsorship support. We hope you will choose to support SDASFAA with your participation and involvement throughout the coming year!

**SDASFAA Membership Dues**

\_\_\_\_20XX calendar year membership dues $75

One membership per organization; required for participation in any SDASFAA activities.

**SDASFAA Spring Conference Support Packages**

\_\_\_\_Partner $500

Includes spring conference benefits: exhibit booth, free conference registration for one organization representatives ($100 value), time on conference agenda to provide corporate update, brochure/flyer included in registration packets, recognition as conference sponsor, and list of conference attendees for networking opportunities.

\_\_\_\_Colleague $200

Includes spring conference benefit: member’s choice of \_\_\_\_brochure/flyer included in registration packets *or* \_\_\_\_time on conference agenda to provide corporate update.

\_\_\_\_Sponsored Meal/Break $TBD

Receive recognition by sponsoring a conference meal or break. Conference chair will contact you regarding pricing.

**Additional Support Packages**

\_\_\_\_Leadership Development and Training $550

Provide scholarship support for SDASFAA members to pursue training and leadership development through RMASFAA Leadership Pipeline and/or other national, regional, or state events.

\_\_\_\_Donation Support $\_\_\_\_\_\_\_\_

Provide any dollar amount for support of SDASFAA activities.

**Total Amount of Check Enclosed = $\_\_\_\_\_\_\_\_\_\_\_ (minimum $75.00)**

***Please remit dues and support by January 15, 20XX.***

If any of the following information is incorrect, please provide updated information.

Name of Organization:

Mailing Address:

City, State, Zip:

Contact Person:

Phone:

Email Address:

**Make check payable to: SDASFAA**

Remit to: , SDASFAA Treasurer

Campus or Location

Address

City, SD Zip

Please remit dues by **January 15, 20XX**.

If you have any questions regarding this invoice, please contact me at 605-XXX-XXXX or

email address.

Mark your calendar!

20XX SDASFAA Spring Conference

Conference Dates

Conference Location

**Thank you for your support of SDASFAA!**

Check here \_\_\_\_ if you would like the SDASFAA President to contact you regarding additional opportunities for your organization to support the efforts of SDASFAA!

# APPENDIX C – SDASFAA MEMBERSHIP DUE INVOICE FORM



***South Dakota Association***

***Of***

***Student Financial Aid Administrators***

Date

**INVOICE**

**SDASFAA MEMBERSHIP DUES FOR THE YEAR 20\_\_ . . . . . . . . . . $75.00**

**Make check payable to: SDASFAA**

Please remit to: \_\_\_\_\_\_\_\_\_\_, SDASFAA Treasurer

Campus or Location

Address

City, SD Zip code

Fax: 605-XXX-XXXX

Please remit dues no later than **January 15, 20\_\_.**

If you have any questions regarding this billing,

please contact me at 605-XXX-XXX or email current Treasurer.

**If any of the following information is incorrect, please provide the correct information to me.**

Name of Institution:

Mailing Address:

City, State, Zip:

Contact Person:

Phone:

Email Address:

Mark Your Calendar:

20\_\_ SDASFAA Spring Conference

<Conference Dates>

<Conference Location>

**Thank you for your continued support of SDASFAA!**

# APPENDIX D – MEMBERSHIP APPLICATION FORM

**MEMBERSHIP APPLICATION**

NEW MEMBERSHIP

I hereby apply for (circle one) Institutional / Associate membership to the South Dakota Association of Student Financial Aid Administrators (SDASFAA) and, if elected to membership, agree to abide by its Constitution and By-Laws.

Signed:

Signature Title

INSTITUTIONAL MEMBERSHIP shall be limited to persons engaged in the administration of student financial aid in an institution of higher education in the state of South Dakota.

ASSOCIATE MEMBERSHIP shall be open to persons representing public and private agencies and organizations concerned with or engaged in the support and/or administration of student financial aid.

Institution/Association Name

Mailing Address

Phone Fax

Email Address

Please list the other professional associations that your Institution belongs to: \_\_\_\_\_\_\_\_\_\_\_\_\_

Return this form to the SDASFAA Treasurer at the address below.

APPLICATION FOR MEMBERSHIP in the association shall be made to the SDASFAA Treasurer for processing. Applications for first-time members must be approved by an affirmative vote of a majority of the Executive Council. Associate members may not advertise in their literature that they are members of SDASFAA. SDASFAA has the right to deny any membership application.

**Mail to:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_, SDASFAA Treasurer

Campus or Location,

Address

City, SD Zip Code

**Email:** \_\_\_\_\_\_\_\_\_\_\_\_ (Current Treasurer)

**Fax:** 605-XXX-XXXX