

SDASFAA New Board Member Onboarding Document

Welcome to the South Dakota Association of Student Financial Aid Administrators (SDASFAA) Board! We are deeply grateful for your commitment to volunteer as a new board member! Your time, expertise, and dedication are vital to advancing our shared mission: supporting students, institutions, and professionals through the effective administration of financial aid. Thank you for stepping into this important role!

In this document you will find information about the association, the committees, and the board positions.

SDASFAA Philosophy:

The South Dakota Association of Student Financial Aid Administrators (SDASFAA) ascribes to the general principle and purpose that student aid is to provide financial resources to students who would otherwise be unable to pursue a post-secondary education. The Association 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 all Title IV 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 in Title IV regulations. The Association will schedule two (2) meetings a year, one of which will be the annual spring meeting for the election of officers and to conduct business of the Association. The purpose of these meetings will be to provide an ongoing dialogue among members, and to provide a meaningful exchange of ideas through the conference format.

SDASFAA Board:

Meetings:

- The SDASFAA board meets 4 times each calendar year. The meetings are held as follows:
 - Winter meeting: Held in January or February, virtually. The board votes virtually on the budget for the year as close to January 1st as possible
 - Spring meeting: Held in April or May, preceding the spring conference, in person.
 - Summer meeting: Held in July, virtually.
 - Fall meeting: Held in November, preceding the fall conference, in person.
 - **Incoming board members are invited to attend the last board meeting before their term begins to observe. This is typically at fall training.
- Preparations
 - The president will provide an agenda and will provide notice to each member on what they need to provide. Committee Chairs (or board representative) and certain board members will need to provide a report. Not all committees will need to provide a report at every meeting. Reports that may be requested include the following:
 - President elect report
 - President Report
 - Past President Report

- Treasurer Report
- Training Committee Report - Representative of committee
- Communication and Website report – Secretary
- Membership and records report – president elect
- Fall training report – one of the 2nd year members at large
- Spring conference report – president (or past president depending on timing of meeting)
- Review committee report –Associate member at large
- Recognition Committee – Past president
- RMASFAA Conference Update - **during a year when we hold the RMASFAA conference in South Dakota a member of the RMASFAA conference committee may be asked to report updates on the planning to provide updates, communicate special requests, etc.

Executive Council Positions:

- President Elect
 - Term: Serves for one year as president-elect, then additional years as president (1) and past president (1)
 - Duties:
 - Chair of Membership and Records Committee
 - Attend 4 board meetings and provide a president elect report for each
 - Attend NASFAA Leadership and Legislative Conference in Washington DC in February (optional)
 - Attend the RMASFAA board meeting and begin as the South Dakota Representative on the RMASFAA Board starting at that conference
 - Attend virtual RMASFAA board meeting in December
- President
 - Term: Serves for one year as president, following the one year as president elect and preceding one year as past president
 - Duties:
 - Develop budget and have it passed virtually
 - Designate committee assignments for the year
 - Hold 4 board meetings
 - Request reports, provide president’s report, schedule meetings, create agenda, and run meetings
 - Attend RMASFAA board meetings
 - Held in February, Summer, and in October, coinciding with the conference again
 - Attend SDASFAA spring conference and run the business meeting
 - Create agenda and script, request reports, provide president report
 - Start planning spring conference for the following year
- Past President
 - Term: Serves one year as past president, following one year as president elect and one year as president
 - Duties:
 - Solicit nominations for awards
 - Attend 4 board meetings and provide past-president reports

- Hold spring conference
 - Provide past-president report at board meeting
 - Solicit nominations for board positions and hold elections for the following year
- Treasurer
 - Term: Serves 3 years
 - Duties:
 - Maintain financial records of the association
 - Submit fiscal reports for each board meeting
 - Distribute new membership forms to the president for board approval, send and collect membership dues, and compile a listing of paid members to membership committee
 - Pay bills
 - Review and process reimbursement requests
 - Prepare and submit a non-profit corporate tax return
 - Prepare and support to the Secretary of State an annual non-profit report
 - Provide information to IRS as required regarding status as educational and charitable organization
 - Prepare information for review committee to conduct annual audit
 - Represent SDASFAA at the NASFAA leadership conference in the first year of assuming office (optional)
 - Manage association funds in fiscally responsible manner and bring items to board when necessary
 - le: transferring funds between accounts, CD investments, etc
 - Update signatures on SDASFAA banking accounts to newly elected treasurer and President elect
 - Collect event registration fees
 - Prepare and present prior-year financial records for the annual business meeting
- Secretary
 - Term: Serves 2 years
 - Duties:
 - Record minutes of all association and executive council meetings
 - Post draft minutes to the website within 60 days of any association meeting with notification of said posting sent to the SDASFAA listserv
 - Minutes will be posted in final form to the website within 30 days of approval by membership and notice of posting sent to the membership via listserv
 - All draft minutes will be finalized after the next scheduled corresponding meeting
 - Update association documents as approved or necessary and submit to website committee for posting to SDASFAA webpage within 30 days
 - Serve as chair of Communication and Website committee
- Members at Large (4 total)
 - Term: Serves 2 years
 - Duties:
 - First Year Members at Large serve on Fall Training Committee
 - Second Year Members at Large Co-chair fall training committee
- Associate Member at Large
 - Term: Serves 2 years
 - Duties:

- Serve as chair of the review committee
- Serve as liaison to the executive council for all associate members

Committees:

- Training Committee
 - Membership
 - Minimum of 5 members total
 - Chair and Vice Chair are assigned at the discretion of the president
 - At least one member must be serving on the executive council
 - There must be a member designated as a liaison to each the Fall Training Committee and the Spring Conference Committee
 - Responsibilities
 - Responsible for coordinating the credential training, NASFAA speaker, and one to two additional sessions including a DEI topic for the annual spring conference
 - Responsible for coordinating the credential training and a DEI session at the fall mini conference
 - Responsible for preparing High School Counselor Workshop materials and recruiting presenters for each site
 - Option for committee to implement additional virtual training through the year through zoom
- Fall Mini Conference Committee
 - Membership
 - Minimum of 5 members total
 - Co-chairs are the 2nd year members at large
 - 1st year members at large are encouraged to volunteer on this committee for experience to chair the conference the following year
 - One member must serve as liaison between the fall conference committee and the training committee
 - Responsibilities
 - Selection of conference dates, facility and contract proposal. Contract must be approved by the executive council.
 - Planning the program agenda, facilitating speakers and all other necessary items such as coordinating snacks/meals if applicable, coordinating audio/visual equipment, coordinating vendor booths or display areas, coordinating guest rooms with the venue, coordinating onsite registration.
- Review Committee
 - Membership
 - Minimum of 3 members including the chair
 - At least one member must be a former treasurer
 - Committee chair is the Associate Member at Large
 - Duties
 - Contact Treasurer to coordinate and conduct an annual audit of Treasurer's records in January/February
 - Report audit review to executive council at the first board meeting and at the annual business meeting
- Recognition Committee
 - Membership

- 3 members designated as past president (chair), past-past president, and current president
 - Responsibilities
 - Solicit nominations for annual awards and select winners
 - Solicit nominations for board openings and hold annual elections
- Spring Conference Committee
 - Membership
 - Minimum of 7 members including chair and vice chair
 - Chair is current president and vice chair is president elect
 - There must be a member designated as a liaison to the Training Committee
 - Committee serves from spring conference to spring conference, instead of for the calendar year
 - Responsibilities
 - Choose location, facility, dates and contract proposal. Contract must be approved by executive council.
 - Choose theme, organize food, decorations, and entertainment if applicable
 - Solicit presenters and plan program including coordination with RMAFAA representatives (executive representative and state swap)
 - Facilitate all necessary items such as coordinating audio/visual equipment, coordinating vendor booths or display areas, coordinating guest rooms with the venue, coordinating onsite registration.
- Communication and Website Committee
 - Membership
 - Minimum of 3 members including chair
 - Secretary is designated as the chair
 - Responsibilities
 - Publish quarterly newsletter
 - Monitor Listserv
 - May host 1-2 gatherings via zoom or other digital resource
 - Maintain website and update calendar
- Membership and Records Committee
 - Membership
 - Minimum of 4 members including chair
 - The President Elect is designated as the chair
 - Membership must include at least one associate member representative
 - Responsibilities
 - Compile and maintain membership list
 - Development and solicitation of new members
 - Follow up with members who have not renewed their membership
 - Maintain historical records, documents, and memorabilia
 - Make recommendations for changes to the constitution and policies and procedures

Additional Resources:

Please see additional documents on our website.

- Constitution, Policy and procedure manual and strategic plan found at <https://sdasfaa.org/governing-documents-and-minutes/>

- Current committee assignments and committee requirements and responsibilities document found at <https://sdasfaa.org/committees/>
- Information on our purpose, philosophy and objectives found at <https://sdasfaa.org/about-sdasfaa/>