



POLICY AND PROCEDURES MANUAL

Midwest Association of Student Financial Aid Administrators
Approved October 21, 2023

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1.0 Introduction to the MASFAA Policy and Procedures Manual

1.1 Purpose

The MASFAA Policy and Procedures Manual is designed to provide guidance, reference material, and historical continuity for the MASFAA Executive Council and Committee Chairpersons. This document is kept in the MASFAA Archives for ease in updating and transfer as Executive Council members and Committee Chairpersons change. The document is maintained by the Association President-Elect from information supplied by MASFAA members and approved by Executive Council. Each Executive Council member and Committee Chairperson is responsible for knowing the content of the MASFAA Policy and Procedures Manual and providing changes and updates, as applicable, to the Association Governance and Planning Committee. The Association Governance and Planning Committee reviews all changes for legality, consistency, and clarity and makes appropriate proposals for Executive Council action. Upon approval, the Association Governance and Planning Committee incorporates changes in the document to the MASFAA Archives and makes copies available to the Executive Council members and Committee Chairpersons. A copy of the Manual will be available on the Association’s website and is to be transferred from the rising President-Elect to the incoming President-Elect. Updates to the Policy and Procedures Manual should be presented by the Summer Executive Council meeting and finalized at the October Executive Council meeting.

The MASFAA Policy and Procedures Manual will be made available to each Executive Council member and Committee Chairperson by the President-Elect at or before the transition Board

retreat. This ensures that the new MASFAA leaders have an accurate, up- to-date document. The document should be provided along with any other materials or documents passed on by the prior Executive Council member or Committee Chairperson. Committee Chairpersons' materials may also contain information not incorporated into the MASFAA Policy and Procedures Manual that is unique to committee work.

1.2 Content

The MASFAA Policy and Procedures Manual supplements the Articles of Incorporation and By-Laws by:

- providing an overview of the Association's structure
- describing the responsibilities of members in leadership positions
- presenting the Association's approved operating policies and procedures

1.3 Use

Members of the Executive Council and Committee Chairpersons will familiarize themselves with pertinent information regarding their duties and the policies of the organization as outlined in the electronic Policy and Procedures Manual, and will communicate new and updated operating policies to the President Elect, who will bring suggested updates to the Association Governance and Planning Committee for consideration..

1.4 MASFAA Mission Statement

The Midwest Association of Student Financial Aid Administrators (MASFAA) is a regional organization of individuals engaged in or concerned with the ethical administration and/or support of student financial aid. Our mission is to promote and provide quality training and professional development opportunities, to advocate and support financial aid programs, and to facilitate effective communication and coordination among interrelated professional associations, thereby serving the needs and interests of students and postsecondary institutions.

1.5 MASFAA Statement of Ethics and Professionalism

All MASFAA members are expected to maintain the highest level of ethical behavior and to refrain from any perception of conflict of interest. All MASFAA members, vendors, exhibitors, and other parties affiliated with MASFAA are required to maintain the highest level of professionalism and reflect a commitment to the financial aid profession; to the goals of the Midwest Association of Student Financial Aid Administrators and to the students we serve. The MASFAA Association Governance and Planning Committee reserves the right to refuse or cancel any individual from an institution's membership and/or refuse vendor or exhibitor support if the Committee deems that this high level of professionalism and commitment is not maintained.

1.6 MASFAA Diversity Statement

MASFAA fosters a transformative experience for its members that honors diversity, inclusion, and social justice. We recognize a common unity that anchors and enlivens our commitment to inclusion and creates brave spaces for dialogue to happen, through initiatives that promote professional development. We hold ourselves accountable to this intentional vision through fostering an integrated community, and recognizing that each member of our organization brings their own unique perspectives, strengths, and critical inquiries to serve our mission. We will continuously evaluate our commitment to diversity through conscious engagement within the communities we serve, and will promote a culture of diversity and inclusion by encouraging involvement and access regardless of race, ethnicity, gender, religion, age, sexual orientation, nationality, disability, appearance, professional level or institution type.

1.7 Membership Policy

Membership shall be of three types: Institutional School, Institutional Associate, and Retired. Application for membership in the Corporation shall be made via the on-line application found on the MASFAA website.

Notification of on-line dues payment will be made to the Treasurer for inclusion as a part of the financial reconciliation process.

A. Institutional School Membership

Institutional School membership shall be limited to higher education institutions actively engaged in the administration of student financial aid in post-secondary institutions located in any of the following states: Illinois, Indiana, Iowa, Michigan, Minnesota, Missouri, Ohio, West Virginia, and Wisconsin.

Each Institutional School Membership shall be entitled to one vote per higher education institution as a member of the Corporation. Any members of that institution may be nominated for and hold office in the Corporation, and be a committee member or chairperson, and shall be urged to attend annual meetings, work conferences, and all other meetings of the Corporation.

B. Institutional Associate Membership

Institutional Associate membership shall be open to non-school entities representing public and private agencies and organizations concerned with or engaged in the support and/or administration of student financial aid.

Institutional Associate membership shall also be open to schools actively engaged in the administration of student financial aid in post-secondary institutions in non-MASFAA states.

Each Institutional Associate Membership shall be entitled to one vote per organization. Any members of that institution may be a committee member or chairperson unless otherwise specified, and shall be encouraged to attend annual meetings, work conferences, and all other

meetings of the Corporation. Employees of an Institutional Associate organization may not hold an elected office within the association.

C. Retired Membership

Retired membership shall be open to persons who have retired from an Institutional membership affiliation with MASFAA.

Each Retired Member shall be entitled to vote, to be a committee member or chairperson unless otherwise specified, and shall be encouraged to attend annual meetings, work conferences, and all other meetings of the Corporation.

MASFAA defines a retired member as individuals fully retired or no longer employed in the financial aid profession (defined as deriving less than 25% of income from financial aid related activities, including consulting).

2.0 Executive Council

2.1 Meetings

- A. The Executive Council typically meets three times per year: at the annual conference and two more meetings as scheduled by the President.
- B. The October meetings are held in conjunction with the MASFAA Annual Conference and will be held at a time determined by the applicable year President as most convenient.
- C. One meeting will typically be held at the site of the upcoming MASFAA Annual Conference. A tour of the facility led by hotel management may be incorporated in this meeting.
- D. The Executive Council may choose to conduct meetings through use of conference calls or other electronic means.
- E. Committee Chairpersons may or may not be invited to meetings as determined by the President.
- F. Robert's Rules of Order shall be followed. A review of Robert's Rules will be conducted by the President Elect at their retreat.

2.2 Meeting Agendas

- A. Meeting announcements, arrangements and agendas are prepared and distributed prior to each meeting. This activity may be performed by the President or in cooperation with the Secretary.
- B. Written and/or oral reports are made by the President, Immediate Past President, President-Elect, Vice President, Secretary, Treasurer and each State Association Delegate at each Executive Council meeting. Written reports are submitted by the Chairperson of each standing, discretionary, and ad hoc or special committee. Committee chairpersons in attendance at the meeting present written and/or oral reports.

2.3 Location of Meetings

Location of the Association's Finance Committee, Association Governance and Planning Committee and other Executive Council meetings is determined by the President.

2.4 Meeting Minutes

Unofficial minutes are posted to the Association's Website by the Secretary as soon as possible after each meeting. Minutes should be posted within one month of the completion of the meeting but no later than one month prior to the next scheduled Executive Council meeting. Board members will receive notification of the posting of the minutes and are responsible for review of such minutes prior to the Executive Council meeting.

2.5 Detailed Officer Descriptions

2.5.1 President

Function: The President acts as the Chief Executive Officer of the Association, presiding at all meetings of the Association and chairing all meetings of the Executive Council.

Responsibilities:

1. Participates at Executive Council meetings and Association meetings, contributes to the formulation of Association policies and procedures and assists with other Association activities as needed.
2. Provides leadership and direction to all activities of the Association, the Executive Council, and all standing, discretionary and ad hoc or special project committees and task forces of the Association.
3. Serves as the official representative and spokesperson of the Association and the Executive Council or delegates such responsibility to another member of the Executive Council or Committee Chairperson as may be deemed necessary from time to time.
4. Calls and presides at all meetings of the Association and the Executive Council. Determines length of floor debate, manner of voting, and agenda items. Appoints meeting parliamentarian; traditionally the President-Elect.
5. Appoints all committee and task force chairpersons subject to confirmation by the Executive Council, and approves committee members.
6. Serves as an ex-officio member of all committees and task forces.
7. Serves as a member of the Finance Committee and the Association Governance and Planning Committee.
8. Attends NASFAA Board of Directors meetings to represent the MASFAA Executive Council and Association membership and reports back to the MASFAA Executive Council and Association membership the actions taken and NASFAA concerns. Effective with the July 2013 NASFAA year, the President will function as the Observer to the NASFAA Board and will not function as a voting member.

9. Represents MASFAA at three State Association Meetings.
10. Submits an annual report to the Association on all matters which may be of interest or concern to the Association members.
11. Submits correspondence and the annual report to Research and Archives in December following the office term.
12. Submits the following items to the Electronic Services Committee Chairperson, by October 1 prior to the conference in which he or she will become the President, for inclusion on the MASFAA website:
 - a. Introduction (letter from the President),
 - b. Current MASFAA Executive Council and Committee Chairperson listing,
 - c. Updates to the Past-President's list.
13. Serves as host for any receptions at the MASFAA Annual Conference.
14. The MASFAA President will be responsible for distributing the list of designated individuals who may communicate on behalf of the Association as necessary.
15. Performs other responsibilities as prescribed by the Executive Council.
16. Composes letter of thanks to the Past President's institution to be sent with \$3000 President's stipend.
17. Creates listserv of all current board members or designates the individual(s) who will be responsible for creation of the listserv.
18. Recognizes, on behalf of the Association, important life events of MASFAA members or MASFAA allies; through cards, floral arrangements or other appropriate gestures.
19. If a person elected to a MASFAA position resigns the position before the end of the term for that office, the President may charge the Nominations and Elections Committee to conduct a special election for the position or may replace the person by appointing another eligible member from a MASFAA member institution. Any person selected to fill a vacated position must meet the normal eligibility requirements for an elective MASFAA office. Consideration should be given to offering the position to others who ran for the position in the most recent election, but is not required. The President is authorized to act alone in making a replacement selection but also may choose to consult with other members of the Executive Board. (See 5.12 for additional information.) In the event an individual is elected and is employed by a member institution at the time they are elected and the member Institution does not renew their membership, the President, in consultation with the Executive Council, will determine whether that individual will continue to serve in their elected capacity.
20. Administers the following Oath of Office and passes the gavel to incoming President; I solemnly affirm that I (name) will faithfully execute the Office of President of the Midwest Association of Student Financial Aid Administrators, and will, to the best of my ability, further its mission and stated purposes, assure good stewardship of its resources and respond to the needs of its membership.

Tenure: The president serves for one year commencing with the adjournment of the Annual Meeting at the end of their term of office as President-Elect.

2.5.2 President-Elect

Function: The President-Elect is an Officer of the Association and performs the duties of the President in the event of absence, incapacity, or termination of the President and performs such duties as are assigned by the President or prescribed by the Executive Council.

Responsibilities:

1. Participates and votes at Executive Council meetings and Association meetings, contributes to the formulation of Association policies and procedures and assists with other Association activities as needed.
2. Coordinates preparation of the annual budget.
3. Serves as a member of Finance Committee, the Nominations and Elections Committee, and the Association Governance and Planning Committee.
4. Assists the President in representing the Association at three State Association meetings unless otherwise directed by the President.
5. Performs other responsibilities as assigned by the President or prescribed by the Executive Council.
6. Updates the Policy and Procedures Manual in conjunction with Association Governance.

Tenure: The President-Elect serves for one year, commencing with the adjournment of the Annual Meeting of the Association following their election and begins the term of President in the following year.

2.5.3 Vice-President

Function: The Vice-President is an Officer of the Association and oversees the finances of the organization in conjunction with the Treasurer and Treasurer-Elect, performs the duties listed below and the duties of the President in the event of absence or incapacity of both the President and the President-Elect, as well as such duties as are assigned by the President or prescribed by the Executive Council.

Responsibilities:

1. Participates and votes at Executive Council meetings and Association meetings, contributes to the formulation of Association policies and procedures and assists with other Association activities as needed.
2. Serves as the Chairperson and Executive council liaison for the Finance Committee.
3. Serves as a member of the Association Governance and Planning Committee.
4. Conducts the regular meetings of the Finance Committee, usually in conjunction with the Executive Council meetings.

5. Monitors the financial status of the Corporation and reports the results of the review to the membership at the Annual Meeting.
6. Authorizes and reviews an annual review of accounting records of the financial status of the Corporation and reports the results of the review to the membership at the Annual Meeting.
7. Monitors the incorporated and tax exempt status for the Corporation and files the "Statement of Continued Existence" for the State of Ohio every five (5) years; 2009, 2014, 2019, etc.
8. Serves as legal authority for the Corporation, Executive Council, and Committees.
9. Assists the Treasurer-Elect with the collection of debts owed to the Corporation, especially past due accounts receivable.
10. Reviews and is responsible for renewal/ adjustment of insurance policies of the Corporation; any revisions are to be brought to the Executive Council prior to adjustment.
11. Authorizes, reviews, and signs the corporation tax returns and in conjunction with the tax preparer, ensures the filing of the tax return with the IRS by applicable deadlines.
12. Negotiates and signs contracts upon Executive Council approval for services such as account services and membership services.
13. Submits correspondence, Finance Committee Minutes, annual review of account records, tax return or other appropriate financial records to the Archivist in December following the conclusion of term of office.
14. Annually requests that the State Association delegates review the tax-exempt status in their states and take any necessary steps to initiate or renew tax- exempt status accordingly.
15. Reconciles monthly bank statements.
16. Performs other responsibilities as assigned by the President or prescribed by the Executive Council.
17. Include place, address and phone number of the location where the annual financial records will be archived within the Year End Report.

Tenure: The Vice-President serves for two years commencing with the adjournment of the Annual Meeting of the Association following their election.

2.5.4 Secretary

Function: The Secretary is an Officer of the Association and is responsible for developing, distributing, and maintaining the applicable records of the Association and the Executive Council. The Secretary distributes meeting notices and such other communications as provided for in the Articles of Incorporation and By-Laws.

Responsibilities:

1. Participates and votes at Executive Council meetings and Association meetings, contributes to the formulation of Association policies and procedures and assists with other Association activities as needed.
2. Serves as a member of the Finance Committee
3. Develops and distributes Finance Committee meeting minutes within 30 days of the meeting.
4. Develops and distributes Executive Council meeting minutes to Executive Council, Committee Chairpersons and designated Association members within 30 days of the meeting.
5. Coordinates production and distribution of stationary and envelopes as appropriate. (Letterhead is typically electronic.)
6. Distributes the following: List of Executive Council members and Committee Chairpersons with office/ home/ and email address(s), phone number(s) and fax number(s).
7. Submits correspondence collected from Executive Council members, meeting agendas, minutes/reports from Executive Council meetings, minutes/ reports from general business meetings and Newsletters/Blog, if not available to the Archives on-line, to the Archives in December following the office term.
8. Performs other responsibilities as assigned by the President or prescribed by the Executive Council.

Tenure: The Secretary serves for two years commencing with the adjournment of the Annual Meeting of the Association following their election.

2.5.5 Treasurer

Function: The Treasurer is an Officer of the Association and is responsible for developing, distributing, and maintaining the financial records of the Association and the Executive Council and performing transactions as directed by the Finance Committee. The Treasurer shall be ready whenever required to give to the Executive Council any funds and financial records as requested.

Responsibilities:

1. Participates and votes at Executive Council meetings and Association meetings, contributes to the formulation of Association policies and procedures, and assists with other Association activities as needed.
2. Serves as a member of the Finance Committee.
3. Pays bills and reimbursements owed by the Association.
4. Assists the Treasurer-Elect with the collection of all debts owed the Association.
5. Maintains adequate and appropriate records of all financial transactions of the Association.
6. Files all financial reports in a proper and timely manner.
7. Assists the President-Elect with the preparation of the annual budget for review and approval of the Finance Committee and Executive Council.

8. Assembles bank statements and other documents necessary for the contracted accounting organization to prepare the Association's Federal Income Tax Return in a manner and time adequate to meet IRS filing deadlines, including mailing of quarterly tax payment.
9. Assembles bank statements and other documents necessary for the Finance Committee and Delegates-At-Large to conduct an annual review of the Association's finances.
10. Assists any Association committee or sponsored activity coordinator needing financial advice or services.
11. Submits correspondence, Treasurer's reports and the annual budget report to Research and Archives in December following the office term.
12. Coordinates payment of \$3,000 to President's institution immediately following the President's term as described in section 4.24..
13. Performs other responsibilities as assigned by the President or prescribed by the Executive Council.

Tenure: The Treasurer serves one year commencing with the adjournment of the Annual Meeting of the Association at the end of the term of office as Treasurer-Elect.

2.5.6 Treasurer-Elect

Function: The Treasurer-Elect is an Officer of the Association and performs the duties of the Treasurer in the event of absence or incapacity of the Treasurer. The Treasurer-Elect is responsible for assisting the Treasurer with developing, distributing, and maintaining the financial records of the Association and the Executive Council and performing transactions as directed by the Finance Committee. The Treasurer-Elect shall be ready whenever required to give to the Executive Council any funds and financial records as requested.

Responsibilities:

1. Participates and votes at Executive Council meetings and Association meetings, contributes to the formulation of Association policies and procedures and assists with other Association activities as needed.
2. Serves as a member of the Finance Committee.
3. Receives monies of the Association.
4. Bills and collects debts owed to the Association, with particular attention being given to the monitoring and collection of past due accounts receivable.
5. Assist the Treasurer in maintaining adequate and appropriate records of all financial transactions of the Association.
6. Assist the Treasurer in filing all financial reports in a proper and timely manner.
7. Assist the President-Elect and Treasurer with the preparation of the annual budget for review and approval of the Finance Committee and Executive Council.

8. Work with the Delegate-at-Large to assemble bank statements and other appropriate records in support of the Finance Committee and Delegate-At-Large annual review of the Association's financial records.
9. Assist any Association committee or sponsored activity coordinator needing financial advice or services.
10. Performs other responsibilities as assigned by the President or prescribed by the Executive Council.

Tenure: The Treasurer-Elect serves for one year, commencing with the adjournment of the Annual Meeting of the Association following their election and assumes the position of Treasurer at the end of their term as Treasurer-Elect.

2.5.7 Immediate Past President

Function: The Immediate Past President is a Trustee of the Association and performs such duties as are assigned by the President or prescribed by the Executive Council. [A Trustee is defined as an elected member of the Executive Council.]

Responsibilities:

1. Participates and votes at Executive Council meetings and Association meetings, contributes to the formulation of Association policies and procedures and assists with other Association activities as needed.
2. Attends the NASFAA Board of Directors meetings as the sole MASFAA Executive Council official (voting) representative.
3. Serves as the Chairperson and Executive Council liaison for the Nominations and Elections Committee.
4. Serves as the Chairperson and Executive Council liaison for the Association Governance and Planning Committee.
5. Serves as a member of the Finance Committee.
6. Submits Nominations and Elections information to Research and Archives in December following the office term.
7. Oversees Strategic Long Range Plan goals and objectives. Assigns objectives to each committee and evaluates each committee's performance at year end.
8. Serves as a mentor for and helps train the President-Elect.
9. Performs other Responsibilities as assigned by the President or prescribed by the Executive Council.

Tenure: The Immediate Past President serves for one year, commencing with the adjournment of the Annual Meeting of the Association at the end of the term of office as President.

2.5.8 Delegate-At-Large (4 Positions)

Function: Delegates-at-Large are Trustees of the Association and serve as representatives of the general membership of MASFAA for the purpose of discussing issues and concerns brought before the Executive Council.

Responsibilities:

1. Participates and votes at Executive Council meetings and Association meetings, contributes to the formulation of Association policies and procedures and assists with other Association activities as needed.
2. Each Delegate is assigned by the President to oversee the work of assigned committee(s) and serves as a liaison for the committee(s) to the Executive Council.
3. Delegates meet regularly with the President-Elect (1st year delegates) or Past-President (2nd year delegates) to keep the Presidents council informed about the progress of committees and to bring up constituent concerns.
4. Delegates-at-Large are responsible for the annual review of the Association's Finances including the Association's accounting records.
5. Performs other responsibilities as assigned by the President or prescribed by the Executive Council.
6. Coordinates the submission of committee year-end reports and documents to the MASFAA Archives.

Tenure: The Delegate-at-Large serves for two years commencing with the adjournment of the Annual Meeting of the Association following their election.

2.5.9 State Association Delegate

Function: The State Association Delegates are Trustees of the Association and serve as representatives of the general membership of MASFAA for the purpose of discussing issues and concerns brought before the Executive Council and as the representative of their State Association for the purpose of communicating state concerns to the region and regional concerns to the state.

Responsibilities:

1. Participates and votes at Executive Council meetings and Association meetings, contributes to the formulation of Association policies and procedures and assists with other Association activities as needed.
2. Represents the interests, concerns and perspective of their state to the region.
3. Communicates regional plans, activities and concerns to the state.

4. As a member of the Executive Council, represents not only the State Association perspective but also participates as a member of MASFAA and represents the general membership.
5. Serves as the contact person for MASFAA members requesting information and references concerning the state and for State Association members requesting information concerning regional activities.
6. Shares state activities and committee reports with the Executive Council and other State Association Delegates.
7. Coordinates timing and substance of state meetings with the regional calendar.
8. Provides input via the MASFAA Immediate Past President to the NASFAA Board of Directors as needed.
9. Keeps the MASFAA President abreast of State Association actions or decisions that may impact the Region.
10. Participates in the MASFAA sponsored State Delegate Exchange Program.
11. Submits written reports and provides information as requested.
12. Notifies any and all State President-Elect candidates within their specific state of the State President's duty – if elected – to serve on the MASFAA Executive Council for one Board year. The specific year of service is to be determined by each state.

Tenure: State Association Delegates are designated by the State Association and serve for the year coinciding with the MASFAA Executive Council year, not the State Association year. The State Association Delegate must be employed by a MASFAA member institution. Delegates who do not hold Institutional School Membership status will not have voting rights on the Executive Council. (Some states within MASFAA do, in some instances, allow associate members to serve as president of their state association.)

2.6 Concurrent Offices

In the event that an individual simultaneously holds a position as elected officer and state representative position on the MASFAA board:

1. If the individual chooses to hold both positions, they will be allowed one vote.
2. If the state the individual represents opts to appoint an alternative state representative to the MASFAA board, each position retains their vote.

3.0 Committees

3.1 Standing Committees

Standing committees are permanent committees, required by and named in the By-Laws. Addition of or removal from “standing committee” status must be approved as a By-Laws change through a vote of the membership. Current standing committees are:

1. Association Governance and Planning Committee
2. Annual Conference Planning Committee
 - a. Program Committee
 - b. Local Arrangements Committee
 - c. Site Selection Coordinator
3. Finance Committee
4. Membership Committee
5. Nominations and Elections Committee
6. Professional Development Committee

3.2 Discretionary Committees and Appointments

Discretionary committees may be continuing committees but are not named in the By-Laws and are reappointed annually at the discretion of the President with approval of the Executive Council. Current discretionary committees are:

1. Awards Committee
2. Electronic Services Committee
3. Inclusion, Diversity, Equity and Access Committee
4. Associate Member Relations Committee
5. Research and Archives Committee
6. State Representative Liaison
7. Summer Institute and Leadership Symposium Committee

3.3 Ad Hoc, Special Committees and Task Forces

Ad Hoc and Special Committees are appointed by the President, with the approval of the Executive Council, to address a specific purpose or issue which will ordinarily reach conclusion within one year.

3.4 Committee Membership Policy

1. Committee members must hold Institutional or retiree membership status in good standing per the By-Laws. Exceptions to this requirement are noted in the various committee membership descriptions.

2. All committee members are appointed by the respective committee chairperson.
3. Committee Chairpersons are recommended by the President to Executive Council for approval.
4. Committee Chairpersons recommend committee members to the President for approval.
5. A member should serve on only one committee unless mandated by the By-Laws or the policies and procedures or approved by the President.
6. Committee Chairpersons must first consider all volunteers who submitted a volunteer form and select qualified individuals before seeking other members for committee membership. It is further recommended that Committee Chairpersons contact State Association Delegates for additional names once the volunteer form list has been exhausted. The process may be amended with the approval of the President if the structure of the committee warrants it.
7. All Committee Chairpersons should make every effort to appoint committee members who are representative of the membership, i.e., ethnicity, gender, institution type, and state. MASFAA Annual Conference scholarship recipients will be given priority consideration for committee member selection.
8. Persons considered for committee work at the regional level should have exhibited some involvement in professional activities, particularly at the state level.
9. The President has the authority to remove from office, any committee chair or member for actions including, but not limited to: theft, embezzlement, misconduct or misuse of the position.
10. An elected/ appointed Association Trustee may be removed from office for actions including but not limited to theft, embezzlement, misconduct or misuse of the position, by a majority vote of the Executive Council.

3.5 Committee Reports

1. Committee Chairpersons will prepare an agenda for each committee meeting and ensure minutes are taken.
2. Each committee of MASFAA is responsible for submitting written reports for MASFAA electronic media as requested by the Secretary .
3. A written report is required for each Executive Council meeting. If the Committee Chairperson will be unable to attend any meeting, a written report is to be sent to the assigned Delegate-at-Large, copied to the President, prior to the meeting.
4. Committee Chairpersons will be notified of the specific date and location of each Executive Council meeting, in advance of each Executive Council meeting.
5. Each Committee Chairperson will be responsible for completing a final year-end report. This will include a list of accomplishments and suggestions or recommendations for future committees and how the committee met the assigned Strategic Long Range Plan and President's goals. Committee Chairpersons not continuing as the committee chair for the following year will pass all related materials to the new chairperson at or before the MASFAA Annual Conference.
6. The President will designate Executive Council officers or trustees to be responsible for particular committees. Reports should be submitted to the designated officer or trustee acting as liaison to the Executive Council and copied to the President.

3.6 General Responsibilities

1. Standing and Discretionary Committee responsibilities are specifically outlined below. Committee Chairpersons are responsible for seeing that their committees perform as outlined.
2. Each committee and Chairperson should develop, at the beginning of the year, their goals and objectives, plan of action, and priorities for the coming year. This would also include a calendar showing dates, activities, etc.
3. Committee Chairpersons are responsible for implementing the goals and objectives during the year of service.
4. Committee Chairpersons are responsible for calling all meetings and making physical arrangements, notifying the President of all meetings, setting the meeting agendas, distributing the agenda to committee members, the President, and the Executive Council Delegate-at-Large liaison prior to the meeting and distributing reimbursement forms to all committee members.
5. Committee Chairpersons are responsible for providing the members with guidelines as to their responsibilities and tasks for the year and monitoring the performance of the committee and committee members.
6. Committee Chairpersons are accountable for the budgets approved by the Executive Council. As such, chairpersons should monitor all expenses to be sure that they are legitimate expenses of the committee and within the committee's budget. Any Expense/Reimbursement Claim Form, submitted by a committee member, should be signed by the Committee Chairperson and submitted to the Treasurer for reimbursement of expenses, along with all original receipts submitted by the claimant.
7. MASFAA committees should make every attempt to coordinate their activities with state and national committees with similar responsibilities.
8. Committees and Committee Chairpersons may have other duties as assigned by the President and/or Executive Council.
9. The Committee Chairperson submits records of committee work to Research and Archives in December.
10. Committee Chairpersons shall send a list of committee members to the President, Immediate Past President, and Treasurer prior to the first Executive Council meeting.
11. Committee Chairpersons shall post record of committee work on the Association website.

3.7 Term of Service

The term of service for Committee Chairpersons and members is one year, except as specified in the By-Laws.

3.8 Committee Meeting Expenses

The travel expenses incurred by committee members in attending committee meetings and performing authorized committee activities will be covered according to the policies of the Association.

3.9 Detailed Standing Committee Descriptions

3.9.1 Association Governance and Planning Committee (AGPC)

Purpose: To advise the President and Executive Council on issues of abiding by the MASFAA Articles of Incorporation, By-Laws, Policy and Procedures Manual, and to develop long term recommendations related to MASFAA's mission, structure, operation, and service to members.

Responsibilities:

1. Completes committee activities as directed by the President, or as prescribed by the Executive Council. This includes submitting a report for each Executive Council meeting, submitting a year-end report for the annual conference, submitting articles for electronic media and forwarding committee information to Research and Archives by December.
2. Reviews alternatives and long-term recommendations regarding MASFAA's mission, structure, operation and service to members.
3. Monitors and recommends changes to the long-range plan for the Association.
4. Advises the President and Executive Council on issues of abiding by the MASFAA Articles of Incorporation, By-Laws, and Policy and Procedures Manual and assures that proper procedures and structure are followed as outlined in these documents.
5. Reviews committee membership in cooperation with the Membership Chairperson to ensure that all committee members, unless otherwise stated within the specific committee description, hold Institutional or retiree membership status and are in good standing per the By-Laws.
6. Maintains computer file of the Policies and Procedures Manual; annually reviews and updates all changes for legality and clarity and makes it available on the Association Website and to Executive Council members.

Membership: Chairperson: Immediate Past-President. Members: President, President-Elect, Vice President, Secretary, and two previous Past-Presidents.

3.9.2 Annual Conference Planning Committee - Program

Purpose: To design and conduct a successful annual conference program that meets the professional needs of the MASFAA membership.

Responsibilities:

1. Completes committee activities as directed by the President or as prescribed by the Executive Council. This includes submitting a report for each Executive Council meeting, submitting a year-end report for the annual conference,

- submitting articles for electronic media and forwarding committee information to Research and Archives by December following the year of service.
2. Designs and recommends to the Executive Council a MASFAA Annual Conference which accommodates the needs of the financial aid profession.
 3. Works closely with the Annual Conference Local Arrangements Committee and Site Selection Coordinator to ensure that adequate arrangements have been made.
 4. In conjunction with the Annual Conference Local Arrangements committee and Site Selection Coordinator, prepares and recommends a budget and registration fees for the MASFAA Annual Conference for review and approval of the Finance Committee and Executive Council.
 5. Submits the following items to Research and Archives in December; a) Copy of Annual Conference program and b) Annual Conference planning information.
 6. Encourages posting of interest session presentation on website.

Membership: Chairperson: Appointed by the President and approved by the Executive Council..
Members: Committee must include one member from each MASFAA state (includes chairperson), selected by the Chairperson and approved by the President. The next year's Chairperson of the Annual Conference Planning Program and the previous year's Chairperson of the Annual Conference Planning Program should be included in the committee's membership.

Qualifications: Members must hold Institutional or retiree membership status and be in good standing per the By-Laws, be representative of the membership and have knowledge of/or interest in professional development.

3.9.3 Annual Conference Planning Committee – Local Arrangements

Purpose: In consultation with the Conference Program Committee, the Local Arrangements Committee will plan the overall annual conference format, activities, and agenda that will attract both novice and seasoned members of the Association. The Conference Local Arrangements Committee, in consultation with the Site Selection Coordinator will execute hotel arrangements and other provisions to support conference activities as necessary.

Responsibilities:

1. Completes committee activities as directed by the President or as prescribed by the Executive Council. This includes submitting a report for each Executive Council meeting, submitting a year-end report for the annual conference, submitting articles for electronic media and forwarding committee information to Research and Archives by December following the year of service.
2. In cooperation with the Associate Member Relations committee, actively recruits exhibitors to participate in the conference.
3. Coordinates all pre-conference correspondence.

4. In conjunction with the Annual Conference Program committee, prepares and recommends a budget and registration fees for the MASFAA Annual Conference for review and approval of the Finance Committee and Executive Council. A preliminary recommendation should be sent to Finance Committee before the winter board meeting.
5. Works closely with the President of MASFAA on arrangements for special guests and events.
6. Keeps an up-to-date Local Arrangements notebook logging events and relevant statistics necessary for future conference planning and submits to Archives at conference's conclusion.
7. In conjunction with the Program Committee, secures appropriate entertainment and facilities to support the overall conference theme and purposes.
8. Serves as the direct liaison with the conference facility for meal arrangements, room requests, audio-visual needs, and all other materials necessary to support the conference.
9. Coordinates all registration activities and routes all funds received through pre-conference and on-site registration to the Treasurer and sends a list of non-member registrants to the Database Manager within two weeks of the Annual Conference.
10. Arranges for the printing of pre-conference and conference programs, name badges, etc.
11. Compiles list of Annual Conference attendees.
12. Assembles registration materials.

Membership: Chairperson: Appointed by the President and approved by the Executive Council.
Members: At least six members (includes Chairperson) selected by the chairperson from the state where the conference will be held and approved by the President. The next year's Chairperson of the Annual Conference Planning Local Arrangements Committee should hold Institutional or retiree membership status and be in good standing per the By-Laws. Additional ad hoc members who are not current MASFAA members may be added to the Committee from the local area to assist with conference logistics and site details. MASFAA will reimburse these ad hoc members for reasonable expenses incurred in performing their committee responsibilities regardless of their membership status in MASFAA. At least one member of the Local Arrangements Committee will be a member of the Donor Development Committee.

Qualifications: Members must hold Institutional or retiree membership status and be in good standing per the By-Laws, be representative of the membership and have knowledge of/or interest in professional development.

3.9.4 Annual Conference Planning Committee – Site Selection Coordinator

Purpose: To notify MASFAA states of their opportunity to host the annual conference, to recommend hotel properties as conference and workshop sites and to negotiate a contract with the hotel property to reserve rooms. The coordinator will maintain the calendar of current and future conferences and assist the President with Executive Council meeting site plans.

Responsibilities:

1. Completes committee activities as directed by the President or as prescribed by the Executive Council. This includes submitting a report for each Executive Council meeting, submitting a year-end report for the annual conference, submitting articles for electronic media and forwarding committee information to the Archivist by December following the year of service.
2. Notifies the state association whose turn it is to host an annual conference according to the established rotation schedule.
 - State Rotation Schedule (in order)
 - Indiana
 - West Virginia
 - Iowa
 - Missouri
 - Ohio
 - Minnesota
 - Illinois
 - Michigan
 - Wisconsin
 - Natural disasters, regional/national emergencies or strategic priorities may result in changes to the schedule, as approved by Executive Council.
3. Examines hotel properties within the selected host state and prepares information on viable properties for final determination by the Executive Council, taking into consideration access and transportation arrangements.
4. Negotiates the best possible contract with the selected hotel to insure adequate room blocks and public space.
5. Maintains the conference calendar and helps promote each annual meeting.
6. Assists the President with securing room rates and meeting space for Executive Council meetings.
7. Responsible and the primary contact person for negotiations with the site properties for all major MASFAA events such as the annual conference, symposia, and workshops.
8. Submits MASFAA Conference locations, facilities, and dates to the Membership Committee and the Electronic Services Committee for inclusion on the web site.

9. Submits contract with conference property and conference site planning information to Research and Archives in December.

Membership: The Site Selection Coordinator is selected by the President and approved by the Executive Council.

Tenure: Prior Executive Councils suggest multiple terms to insure continuity and expertise with hotel properties.

Qualifications: The Site Selection Coordinator and any assistant(s) appointed by the President shall be well acquainted with MASFAA activities and experienced in hotel contract negotiations.

3.9.5 Finance Committee

Purpose: Monitors the annual budget, reviews the general financial position of MASFAA, coordinates and reviews audits, and develops policies with regard to financial matters of the Association.

Responsibilities:

1. Completes committee activities as directed by the President as prescribed by the Executive Council. This includes submitting a report for each Executive Council meeting, submitting a year-end report for the annual conference, submitting articles for electronic media and forwarding committee information to Research and Archives by December.
2. Recommends the annual budget to the Executive Council for approval.
3. Reviews and recommends to the Executive Council the budget and registration fees for all MASFAA workshops and conferences.
4. Assists MASFAA Treasurer with policy issues pertaining to accounting procedures, budget, reviews and audits.
5. Makes recommendations to the Executive Council with regard to financial matters of the Association.
6. Monitors Association income and expenses throughout the year.
7. Authorizes and approves the annual review of the Association's finances.

Membership: Chairperson: Vice-President. Members: President, President-Elect, Immediate Past- President, Secretary, Treasurer, and Treasurer-Elect

3.9.6 Membership Committee

Purpose: To recruit and retain MASFAA member institutions, provide a Membership Directory, and provide service to the membership.

Responsibilities:

1. Completes committee activities as directed by the President as prescribed by the Executive Council. This includes submitting a report for each Executive Council meeting, submitting a year-end report for the annual conference, submitting articles for the electronic media and forwarding committee information to Research and Archives by December.
2. Secures membership information from all nine state associations twice per year. Distributes letters, non-member applications, and any other pertinent information in May and November.
3. Maintains and updates the calendar of membership activities
4. Solicits articles and informational items, prepares and edits electronic media and notifies the Association membership of its availability.
5. Receives, reviews, selects and prepares material to be published in electronic media
6. Contacts each state delegate to insure promotion of MASFAA membership in that state.
7. Provides state delegates with membership supplies throughout the year for distribution at state association events.
8. Provides membership materials for all workshops held during the year and before the MASFAA Annual Conference.
9. May provide membership report at MASFAA Annual Conference business meeting.
10. Work with the Electronic Services Committee to ensure updated membership information is in the Online Membership Directory.
11. Develops membership application and orders and maintains supplies for membership mailings.
12. Obtains information about individuals employed by non-member institutions who are registering for workshops and the annual conference from the Registration Coordinators of these functions within one month following the event in order to update the membership database.

Membership: Chairperson: Appointed by the President and approved by the Executive Council.
Members: Membership should seek representation from each state as well as representation of the sector diversity within the MASFAA region. Members are selected by the Chairperson and approved by the President. The Chairperson may or may not concurrently serve as a state representative.

Qualifications: Members must hold Institutional or retiree membership status and be in good standing per the By-Laws, be representative of the membership and be interested in increasing MASFAA membership. The editor should be a responsible person with initiative and organizational and editorial skills. Willingness to spend necessary time/effort to assure accurate membership information and timely distribution of newsletter.

3.9.7 Nominations and Elections Committee

Purpose: To select nominations for MASFAA offices and prepare the slate of candidates; conduct the MASFAA nominations and election process; and encourage MASFAA members to run for office and fully participate in the NASFAA election process.

Responsibilities:

1. Completes committee activities as directed by the President as prescribed by the Executive Council. This includes submitting a report for each Executive Council meeting, submitting a year-end report for the annual conference, submitting articles for electronic media and forwarding committee information to the Archivist by December.
2. Selects a slate of candidates for MASFAA offices. Committee shall work closely with State Association Delegates and the membership in selecting candidates. Selections are to be made in accordance with criteria approved by the Executive Council. A diverse slate of candidates is explicitly required for the entire slate of candidates and particularly required for the Delegate-At-Large position.
3. Schedules and supervises the MASFAA election process, including submission of the ballot to be posted by Electronic Services
4. Encourages MASFAA members to run for elected NASFAA offices and participate fully in the NASFAA election process.
5. Recommended Calendar: December-February: Development of Slate; Late February: Confirmation of candidates' willingness to run for selected office; March: Publication of ballot on MASFAA Web-Site and initiate 14 day member voting period; April: Announcement of newly elected officers.

Membership: Chairperson: Immediate Past-President. Members: President-Elect and up to nine MASFAA members (including Chair and Past-President), one from each MASFAA member state; selected by the Chairperson and approved by the President.

Qualifications: Members must hold Institutional or retiree membership status and be in good standing per the By-Laws, be representative of the membership and be well acquainted with a significant portion of the membership.

3.9.8 Professional Development Committee

Purpose: To carry out professional advancement and training activities which contribute to the status, competency and image of the members of MASFAA. To collect and disseminate information and opinions concerning federal and state legislation and regulations to MASFAA members, to analyze and promote possible advocacy options open to the Association membership in the area of federal and state legislation and regulations, to provide a mechanism by which the concerns of

MASFAA members about legislation and regulations may be channeled to NASFAA and its various committees.

Responsibilities:

1. Completes committee activities as directed by the President as prescribed by the Executive Council. This includes submitting a report for each Executive Council meeting, submitting a year-end report for the annual conference, submitting articles for electronic media and forwarding committee information to Research and Archives by December
2. Studies the developments in the financial aid field as they affect the nature of the profession and the needs of the personnel and utilizes that information to develop, plan, and execute training events including online training events.
3. Secures materials, requests donations via Donor Development, conducts and/or supervises programs of training and professional advancement. Such programs will be designed to meet the needs of aid administrators at all levels and should be made reasonably accessible to all financial aid administrators.
4. Makes recommendations to the Executive Council on other professional development needs.
5. Establishes communication with NASFAA and other regional and state association training committees so as to be aware of all financial aid training activities in the nation.
6. Prepares and recommends a budget and registration fees for training activities for the review and approval of the Finance Committee and Executive Council.
7. Submits information from all MASFAA training activities to Research and Archives in December.
8. Coordinates with the Annual Conference Planning Program and Local Arrangements Committees, any receptions designed to promote professional development and advancement to be held in conjunction with the MASFAA Annual Conference. This may include summer institute reunions or meet and greets for members new to the profession.
9. Identifies, develops and coordinates, in consultation with the Annual Conference Planning Program Committee, any pre-Conference workshops to be held in conjunction with the MASFAA Annual Conference.
10. Works with the Research and Archives Committee to update and analyze results of the training survey and other surveys designed to elicit information about professional development of the MASFAA membership.
11. Solicits applicants for the MASFAA conference scholarship and selects the recipient(s) based on application. See 4.12 below. Applicant selection should be made by August 1st.
12. Finds participants for MASFAA Matters Webinar series and is the subject matter expert on the GoToWebinar Software for the association. (Software management is shared with Communications and Electronic Initiatives Committee)
13. Reports at least annually to the MASFAA membership on the status of federal and state student financial aid legislation and regulations.

14. Reports as needed to the membership and to the Executive Council on important issues on the federal and state levels affecting student financial aid within the MASFAA region. Works closely with the Electronic Services Committee to place timely information on the Web.
15. Serves as a repository and source of data concerning background information on topics relating to federal and state legislation and regulations of interest to MASFAA members.
16. Reviews and updates the MASFAA Advocacy and Legislative Issues Toolkit.
17. Works with NASFAA representatives with regard to federal and state issues of concern to the MASFAA membership.

Membership: Chairperson(s): Appointed by the President and approved by the Executive Council. Members: Membership should seek representation from each state as well as representation of the sector diversity within the MASFAA region. Members are selected by the Chairperson and approved by the President. The Chairperson may or may not concurrently serve as a state representative.

Qualifications: Members must hold Institutional or retiree membership status and be in good standing per the By-Laws, be representative of the membership and be experienced aid administrators who have experience in training and professional advancement work.

3.10 Detailed Discretionary Committee Descriptions

3.10.1 Research and Archives

Purpose: To assist with the maintenance of the archives of MASFAA records, to provide historical information about MASFAA as requested by the Executive Council and membership, and to focus on research and surveys as defined by the Executive Council .

Responsibilities:

1. Completes committee activities as directed by the President as prescribed by the Executive Council. This includes submitting a report for each Executive Council meeting, submitting a year-end report for the annual conference, submitting articles for electronic media and retaining committee information in the Archives.
2. Directs the collection of records of the association on an annual basis and ensures that the records are added to the MASFAA Archival Collection.
3. Provides historical information or interpretation upon request.
4. Acquaints the membership with the history of the organization through brief, historical notes published in electronic media on an occasional basis.
5. Research and Archives, working with the Secretary, will ensure that any items that should be added to an archive collection will be provided to the appropriate area

for inclusion. Unless there is a request to return these documents or otherwise transfer them to another location, they will be destroyed after being added to the online collection, which is currently stored in Google Drive.

6. Additional information about maintenance of the archives is included in this document under item 4.3.
7. Maintains Survey Monkey subscription to design and distribute surveys as needed by MASFAA.
8. Conducts original research (or commissions/promotes original research) in areas of regional interest as needed. This may include research that might more appropriately be performed at the national level but is not currently being accomplished.
9. May inform MASFAA members of relevant research within the region by preparing--or encouraging preparation of--abstracts for the MASFAA newsletter/blog.
10. Seeks to provide a regional interpretation of research, which is conducted by NASFAA and other groups. When possible, data gathered from respondents within the MASFAA region will be obtained by the Committee. Further analysis of the data will be done by the Committee as deemed necessary/desirable. Such regional characteristics will be reported to the membership in ways which are most effective and cost efficient.
11. Seeks guidance from the MASFAA Executive Council and reports to the Council as appropriate and helpful to the work of both the Council and the Committee. Association members are informed of the work of the Committee through the Association's newsletter/blog and on the Web site.
12. May assist other MASFAA Committees in conducting surveys, such as the MASFAA Conference and/or Summer Institute and Leadership Symposium evaluations.

Membership: Chairperson is appointed by the President and approved by the Executive Council.

Qualifications: Members must hold Institutional or retiree membership status and be in good standing per the By-Laws, should be familiar with the history and structure of MASFAA and have an interest in collecting and preserving the records of the organization.

3.10.2 Awards Committee

Purpose: To recognize those persons who have made significant contributions to MASFAA and/or the financial aid profession.

Responsibilities:

1. Completes committee activities as directed by the President as prescribed by the Executive Council. This includes submitting a report for each Executive Council meeting, submitting a year-end report for the annual conference, submitting

articles for electronic media and forwarding committee information to Research and Archives by December.

2. Annually reviews award criteria and recommends to the Executive Council any needed revisions.
3. Coordinates with Electronic Services to place Awards Nomination Form online.
4. Selects award recipients by working closely with State Association Delegates and the membership.
5. Submits recipient information to Association Governance and Planning for review and approval.
6. Secures all trophies, plaques and certificates.
7. Plans and conducts the award ceremonies at the MASFAA Annual Conference. Publishes a listing of award recipients for distribution at the conference.
8. Submits award information/recipients to the Electronic Services Committee for placement on the Web.
9. Chair must provide to the Electronic Services Committee and President, immediately following the Annual Conference, a list of awardees and nomination letters to enable updating of the awards section of the MASFAA website and provide the President with information on all recipients for personal acknowledgement at each of the state conferences.

Membership: Chairperson is appointed by the President and approved by the executive council.
Members: Membership should seek representation from each state as well as representation of the sector diversity within the MASFAA region. Members are selected by the Chairperson and approved by the President. The Chairperson may or may not concurrently serve as a state representative. As deemed necessary, the Committee may seek assistance from person(s) outside of the organization in order to obtain information on potential candidates.

Qualifications: Members must hold Institutional or retiree membership status and be in good standing per the By-Laws and should be well acquainted with a significant portion of the membership.

3.10.3 Electronic Services

Purpose: To oversee, guide, and develop the content, design, and structure of the MASFAA website (www.masfaaweb.org) and social media channels.

Responsibilities:

1. Completes committee activities as directed by the President as prescribed by the Executive Council. This includes submitting a report for each Executive Council meeting, submitting a year-end report for the annual conference, submitting articles for electronic media and forwarding committee information to Research and Archives by December.
2. Establishes policies for electronic media and social media.

3. Sets the tone, format, and scope of the website and social media.
4. Manages distribution of masfaa.net email addresses.
5. Sends official communications from the website, as needed.
6. Coordinates any website or other advertising with the Associate Member Relations Committee Chairperson.
7. Implements and maintains social media accounts (Facebook page and Twitter) according to guidelines.
8. Promotes the association's social media and web sites.
9. Maintains the web site. Makes recommendations regarding the web site's development including structure, content, design, guidelines, etc. This may include, but is not limited to Association information (By-Laws, committees etc.) membership information, committee information, conference and training opportunities and links to other sites.
10. Subject matter expert on the GoToWebinar and other technology products used by the association. (Software management is shared with Professional Development Committee)

Membership: Chair(s) are appointed by the President and approved by the executive council. Members: At least nine members, selected by the Chair(s) with the approval of the President. Membership should seek representation from each state as well as representation of the sector diversity within the MASFAA region. At a minimum, there should be one member from the Annual Conference Local Arrangements Committee and one member from the Associate Member Relations Committee. In addition, the Treasurer-Elect will be a member of the committee. The member from the Annual Conference Local Arrangements Committee will oversee the conference registration, advertisement and other web functions associated with the annual conference. The member from the Donor Development Committee will oversee the use of the web in raising financial support from lenders, servicers, guarantee agencies and any other organization interested in providing financial support.

Tenure: The Chair(s) may serve multiple years. A year prior to the chair leaving the position, he/she should appoint a committee member who would agree to chair the committee a year in the future.

Qualifications: Members must hold Institutional or retiree membership status and be in good standing per the By-Laws. The Chair should be a responsible person with initiative, social media, and organizational and editorial skills.

3.10.4 Inclusion, Diversity, Equity and Access Committee (IDEA)

Purpose: To provide direction to the President, Executive Council and the Association regarding how its existing programs and policies can be coordinated and improved to enhance and celebrate diversity, and advance issues related to low-income and

disadvantaged students. Additionally, to provide recommendations regarding the appropriate roles for the President, Executive Council and the Association in encouraging and supporting diversity initiatives.

Responsibilities:

1. Completes committee activities as directed by the President as prescribed by the Executive Council. This includes submitting a report for each Executive Council meeting, submitting a year-end report for the annual conference, submitting articles for electronic media and forwarding committee information to Research and Archives by December.
2. The principle of social justice includes the legal and moral obligations to promote opportunity, equality, civility and respect for all people. This Committee is charged with communicating, teaching and promoting these principles throughout the MASFAA region.
3. Plans and conducts a diversity and inclusion event/workshop to be held in conjunction with the MASFAA Annual Conference at the President's discretion.

Membership: Chairperson is appointed by the President and approved by the executive council. Members: Chairperson will seek member representation from each state as well as representation of the sector diversity within the MASFAA region. Members are selected by the Chairperson and approved by the President.

Qualifications: Members must hold Institutional or retiree membership status and be in good standing per the By-Laws and be recognized for active participation in diversity and inclusion advocacy efforts.

3.10.5 Associate Member Relations Committee

Purpose: To serve as a liaison between the corporate communities of vendors--this includes advertisers, donors, and exhibitors--and financial aid administrators.

Responsibilities:

1. Completes committee activities as directed by the President as prescribed by the Executive Council. This includes submitting a report for each Executive Council meeting, submitting a year-end report for the annual conference, submitting articles for electronic media and forwarding committee information to the Archivist by December.
2. Coordinates all efforts to solicit donations from the corporate community of vendors to help defray costs associated with MASFAA- sponsored activities.
3. Represents MASFAA to vendors and the vendors to MASFAA.
4. Provides a forum for the corporate community to disseminate the latest information about services, products, and opportunities, while providing MASFAA an opportunity for revenue enhancement.

5. Work with the Electronic Services Committee to develop Web Ad guidelines and rates for Web advertisers to be forwarded to the Finance Committee for final approval.
6. Work with Electronic Services to make sure any paid banner ads are accounted for.
7. Coordinates the Exhibitor Appreciation Reception, to be held at the MASFAA Conference.

Membership: Chairperson is appointed by the President and approved by the executive council. Members: Membership should seek representation from each state as well as representation of the sector diversity within the MASFAA region. At least one of the members will be a member of the Conference Local Arrangements Committee.

Tenure: The Chairperson serves in the role of chairperson for one year. Members are appointed for staggered two-year terms so that four or five members rotate off each year.

Qualifications: Members must hold Institutional or retiree membership status and be in good standing per the By-Laws and be recognized for active participation in the vendor community.

3.10.6 Access Committee (refer to 2022 Policy and Procedures for prior information)

3.10.7 Advocacy and Legislative Issues Committee (refer to 2022 Policy and Procedures for prior information)

3.10.8 Research Committee (refer to 2022 Policy and Procedures for prior information)

3.10.9 Retiree Involvement Committee (refer to 2022 Policy and Procedures for prior information)

3.10.10 State Issues and Conference Liaison

Purpose: To assist with the coordination of travel, expense reimbursement and management of the MASFAA State Exchange Program as well as provide other helpful information to State Representatives serving on the Executive Council.

Responsibilities:

1. Completes committee activities as directed by the President as prescribed by the Executive Council. This includes submitting a report for each Executive Council meeting, submitting a year-end report for the annual conference, submitting

articles for electronic media and forwarding committee information to the Archivist by December.

2. Works with the nine State Representatives to facilitate the MASFAA State Exchange Program.
3. Helps acquaint the nine State Representatives with the procedures and expectations of serving on the MASFAA Executive Council as voting members.
4. Establish a group email consisting of the nine state representatives as a means to communicate and exchange ideas. Works with Site Selection Coordinator and President to ensure State Representatives have a meeting time to discuss state issues before, during or after board meetings.
5. Updates the MASFAA State Exchange Program schedule as needed.
6. Hold regularly scheduled virtual meetings as a means to keep the state representatives connected to each other and to serve as a forum for representatives to share ideas and concerns that have come up within their states or the MASFAA region.

Membership: State Issues and Conference Liaison is appointed by the President and approved by the Executive Council.

Qualifications: State Issues and Conference Liaison must hold Institutional or retiree membership status and be in good standing per the By-Laws.

3.10.11 Summer Institute and Leadership Symposium Committee

Purpose: To provide an annual opportunity for members to engage in professional training and advancement activities, to expand knowledge and promote leadership skills.

Responsibilities:

1. Completes committee activities as directed by the President as prescribed by the Executive Council. This includes submitting a report for each Executive Council meeting, submitting a year-end report for the annual conference, submitting articles for electronic media and forwarding committee information to the Archivist by December
2. Studies the developments in the financial aid field as they affect the nature of the profession and the needs of the personnel and utilizes that information to develop, plan, and execute training events.
3. Secures materials, requests donations via Associate Member Relations, creates and conducts and/or supervises programs of training and professional advancement. Such programs will be designed to meet the needs of aid administrators at all levels and should be made reasonably accessible to all financial aid administrators.
4. Prepares and recommends a budget and registration fees for training activities for the review and approval of the Finance Committee and Executive Council.

Recommendations should be submitted by December 1 for Summer Institute/Leadership conference.

5. Works with Electronic Services to add information to the website, create and test registration and send official communications.
6. Coordinates with the Annual Conference Planning Program and Local Arrangements Committees, Summer Institute and Leadership Symposium reunions.
7. Coordinates the selection of the Haywood Scholarship – Awarded to one person of color for attendance at the annual conference. Zina Haywood, former MASFAA President, will cover the cost of registration and membership dues in the form of a personal donation. MASFAA will pay for the recipient's room for the annual conference. The selection of the recipient will be made by the Summer Institute faculty and staff. If a qualified recipient decision cannot be made by the Summer Institute faculty and staff, the selection then defaults to the Professional Development Committee. Coordinates payment of these awards with Local Arrangements Chairs and the Treasurer- Elect.
8. Coordinate the purchase of NASFAA training materials in conjunction with the MASFAA President, Vice President, and Treasurer. Distribute purchased NASFAA Training materials to Professional Development and/or Annual Conference Program Committee to be used throughout the year materials are purchased.

Membership: Chairperson(s): Appointed by the President and approved by the Executive Council. Members: Membership should seek representation from each state as well as representation of the sector diversity within the MASFAA region. Members are selected by the Chairperson and approved by the President. The Chairperson may or may not concurrently serve as a state representative.

Qualifications: Members must hold Institutional or retiree membership status and be in good standing per the By-Laws, be representative of the membership and be experienced aid administrators who have experience in training and professional advancement work.

4.0 General Policies and Procedures

4.1 Accounts Receivable Policy

Accounts that remain outstanding to MASFAA at the conclusion of a workshop, conference, training seminar, etc., will normally be turned over to the Treasurer-Elect for follow up and collection activities.

Payments not received by the first date of the event for which they were invoiced will be assessed late fees based on the following schedule, with day 1 representing the first day of the invoiced event:

- At 90 days past due a late fee of \$50 will be assessed.
- At 120 days past due the late fee will increase to \$75.
- At 150 days past due the late fee will increase to \$100.

Exceptions will be allowed if the coordinator of the event (i.e., Local Arrangements Chairperson or Program Chairperson) has negotiated resolution of the outstanding receivable. In these cases, the coordinator will notify the Treasurer-Elect of the status of the receivable on a monthly basis. The Treasurer-Elect will keep the Finance Committee informed of the status at least quarterly. Upon recommendation of the Finance Committee, the account may be turned over to the Treasurer-Elect if the account remains outstanding for a period greater than six months.

The Treasurer-Elect's responsibility will be to follow up periodically on all other receivables and advise the Finance Committee of their status at least quarterly. Write-offs will be reported to the Executive Council via the Treasurer-Elect's report.

Before writing any receivable off as an uncollectible bad debt, the Treasurer-Elect must bring the receivable before the Finance Committee for approval of write-off action. The Vice-President will assist with the collection of debts owed to the Corporation, especially past due accounts receivable.

When the receivable is the result of unpaid membership dues, late fees, or unpaid donation pledges, etc., the Treasurer-Elect will notify the next year's Conference Registration and/or Local Arrangements Coordinator to collect if future participation is attempted.

4.2 Alcohol Policy

MASFAA members are responsible for paying for their own alcoholic beverages at committee meal functions, whether paid for by separate checks or master billing. This includes Executive Council meals. Alcohol is to be excluded from the bill and may not be reimbursed with MASFAA funds. MASFAA committee chairs are responsible for their committee's compliance to this policy.

With a concern for our shared professionalism and a sense of both social responsibility and fiscal constraint, the MASFAA President may authorize the purchase of alcohol for certain conference functions and other MASFAA conference events and activities, i.e. receptions. The MASFAA President is expected to exhibit good judgment in the amount of MASFAA funds spent on alcoholic beverages at these conference functions.

4.3 Archives Policy

MASFAA online archive records are maintained in a Google Drive.

The following steps outline the process for including records in the MASFAA archives.

For inclusion of anything in the on-line imaging collection: At appropriate times during the year, the Secretary or Research and Archives Chair will arrange for transfer of any materials that should be available for online viewing by Association members. This includes Committee and Board meeting minutes, conference materials, photographs, etc.

The Vice President, Treasurer-Elect, and Treasurer will work together to determine which documents should be maintained for IRS audit purposes. Copies of the financial statements, tax returns, reimbursement forms, transfer of administrative authority, and bank statements are included. Copies of tax returns and audits shall be kept for the legally required time frame.

1. Prior to the Spring Executive Council meeting, the Secretary or Research and Archives Chair shall send a letter and transmittal form to the members of the previous year's Executive Council. The letter is used to request that MASFAA information from the previous year be forwarded for imaging into the Archive. The following lists the officer and the records for which s/he has the primary responsibility:

a. President	Correspondence Annual Report
b. President-Elect	Correspondence Policy and Procedure Manual Changes
c. Vice President	Correspondence Finance Committee Information Annual Review of Financial Records
d. Secretary	Correspondence Meeting Agendas Minutes/Reports from Executive Council Meetings Minutes/Reports from General Business Meetings
e. Treasurer	Correspondence Tax Return Treasurer's Reports Annual Budget Report
f. Past President	Nominations/Elections Information MASFAA Publications By-laws Changes Articles of Incorporation Changes
g. Conference Program Committee Chair	Copy of Conference Program Conference Planning Information Copies of Papers Presented at Conference
h. Conference Local Arrangements	Conference Site Planning Information

Committee Chair	
i. Site Selection Chair	Contract with Conference/Training Properties
j. Professional Development Committee Chair	Information for MASFAA Training/Workshops
l. Research Committee Chair	Surveys and Results Summary and Results of Data Analysis
m. Electronic Services Chair	Web pages created MASFAA Newsletters
n. Other Chairpersons	Records of Committee Work
o. Research and Archives	Membership Directory

NOTE: Reports to the Executive Council will be submitted by the Secretary.

2. Prior to the Spring Executive Council meeting, the Secretary will determine what information has been received for the prior year and use this information to contact the responsible individual(s) to obtain the materials and forward them as appropriate for the Archives.

3. The Secretary should be added to any mailing list that is used by MASFAA members to send out MASFAA-related information. The Secretary should also receive copies of all mailings to the Executive Council. This will enable the Secretary to maintain a list of special projects, publications, reports, workshops, etc. to ensure that information about these will be included in the MASFAA collection.

4.4 Campaign Guidelines

The following guidelines are designed to maintain consistency and avoid the potential for negative reaction to campaign practices:

1. Each candidate must hold Institutional School membership and be in good standing per the By-Laws.
2. Unless specifically stated for a particular position, candidates may submit a resume to be posted to the MASFAA Election Website.
3. Candidates shall refrain from distributing promotional campaign materials that result in a direct expenditure of funds to the candidate, their institution, or state association, or other groups or individuals on their behalf.
4. Individual conversation, endorsements, or encouragement for one candidate or the other among MASFAA membership shall be considered as wholesome and within good practice.
5. Candidates shall be prepared to discuss their views, if asked, by other members of MASFAA.
6. Candidates shall be willing to contribute their best efforts to MASFAA if elected.

4.5 Cash Receipts Procedure

A. Dues Revenue

1. Renewal of membership is web-based. Registrants will be instructed to print the confirmation screen and send a check (payable to MASFAA) to the Treasurer-Elect or to pay online with a debit or credit card.

Members institutions will receive renewal reminders in August, and October if they have not yet renewed. They will be instructed to go to the MASFAA web site to renew their membership. An additional email will be sent in late October after the conference to all those who have not renewed membership by that time to notify them that their membership will lapse November 1 if they do not renew soon.

2. When payment is received via check or credit card payment the Treasurer-Elect will update the system to reflect the payment. The system will automatically send an email to the member confirming the payment.
3. The Treasurer-Elect will record the checks and credit card payments in QuickBooks and prepare a deposit slip. Checks and cash will be deposited into the MASFAA checking account.
4. Deposits and fees are recorded in QuickBooks using the date the money is transferred to the MASFAA checking account.

B. Conference/Workshop Registration Fees

1. The Finance Committee will project gross revenue for all conferences and workshops that are scheduled for the new fiscal year during the budget process that occurs in August/September prior to the new fiscal year.
2. Gross revenue projections are approved through budget adoption at the October Executive Council meeting prior to the next fiscal year.
3. Detailed revenue and expense projections for the following events are submitted to the Vice-President for review by the Finance Committee and final Council approval according to the following schedule:

EVENT	TO FINANCE	TO COUNCIL
Summer Institute	By December 1	At Winter meeting
Annual Conference	By January 15	At Winter meeting

Workshops	No later than one month prior to the Council meeting immediately preceding the event	
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During the development of the revenue and expense budgets, the Site and Program committees will use the MASFAA Conference/Workshop Registration Fee worksheet to determine the recommended registration fee for each event.

4. The registration form for the event will be posted on the MASFAA web site at least two months prior to the event. Registrants may complete the form on-line and generate an invoice they can submit for payment. Payment may be made by check or by credit card (VISA or MasterCard) in accord with the refund and privacy policy disseminated on the web site.
5. When the Local Arrangements Committee receives the registration form and payment, the Committee will record the check number and date in the receipt section of the form. The checks and registration forms will be forwarded to the Treasurer- elect.
6. The Treasurer-Elect will deposit checks received.
7. Following closure of conference/workshop, the Local Arrangements Committee Chair(s) and Treasurer-elect will reconcile total cash received with checking account records.
8. The Treasurer-Elect, in conjunction with the Local Arrangements Committee, will issue the final conference/workshop revenue and expense report.

4.6 Conference/Workshop Registration Fees, Expenses and Complimentary Room Policies

A. Membership Dues Payment

Annual dues for MASFAA are established by the Executive Council. The membership year shall be the same as the fiscal year (November 1 to October 31). If dues are not paid, individuals attending conferences or workshops will be charged the non- membership fee, with one exception; members of the host state association will have their membership dues waived if the hosting state association has elected to cancel their fall conference to encourage attendance at the MASFAA annual conference. Requests to bill for dues after conferences or workshops should be refused. If, as a result of this policy, dues are paid twice, the secondary payment will be refunded.

B. Workshop/Conference Registration Fees

1. Registration fees for members attending MASFAA workshops or conferences are established by the Executive Council

- a. An Early Registration fee, which represents the established conference fee, will be offered for the annual conference
 - b. Up to three weeks prior to the conference the regular registration fee will apply.
 - c. Retiree conference registration is one-half that of regular and associate member registration fee.
 - d. Non-member rate for conference registration.
2. Mandatory on-site payment of fees (by cash or personal check) is required if payment has not been received prior to the event. Non-paid registrants will be contacted via email one week prior to the conference.
 3. Conference Registration Fee Policy

Registration for conferences/workshops will be conducted via the MASFAA website. Attendees can pay with a credit card (MasterCard or VISA), an institutional check, a personal check, or cash. Payment must be made no later than on-site check in at the event.

Attendees who have not paid the registration fee at time of check in will be directed to the “On Site” registration booth and will be assisted by a Local Arrangements Committee member trained to handle payments.

Those who have pre-registered, but for whom payment has not been received, **will be required to pay on-site**. A computer with internet access and a printer will be available for the registrant to pay via credit card and print an invoice. The local arrangements committee member will have a list of unpaid invoice numbers to assist in completing registration payment via the web. If payment is made by personal check pending receipt of an institutional check, the personal check will be held for two weeks to allow ample time for the institution to forward payment. If the payment is not received, the personal check will be submitted for deposit. Payment by cash will also be accommodated.

Those registering on-site will be directed to complete registration via the web and make payment at that time. There will be instances when registrants will not know their MASFAA website logins or passwords. They will be directed to a designated committee member who will have access to a username/password lookup function in the Membership Administration area. This process will also be used for those who have pre-registered and need to provide credit card or cash payment.

There are instances when a registration is transferred from one person to another within the same institution. Requests for a transfer should be made to the Treasurer Elect in writing, and should include the name of the person for whom registration is being canceled, the new registrant, and the institution. The Treasurer Elect will cancel the original registrant, and add the replacement.

C. Registration Fee Refund Policy for Annual Conference/Workshops

1. All requests for refunds shall be in writing to the Treasurer.
2. A 100% refund shall be granted if the request is postmarked at least 15 calendar days, prior to the start of the activity. The Treasurer shall confirm that the fee was received and issue the refund.
3. Exceptions for extenuating circumstances to item #2 above may be granted upon approval of the Treasurer, Vice President and President.
 - a. Such requests must be postmarked within 15 days after the activity.
 - b. Up to 50% may be refunded.
 - c. A 100% refund may be allowed for immediate family medical reasons or death in the immediate family or for persons who have resigned from their employing institution prior to the start of stated activity.
4. Appeals for denied refunds may be directed to the Finance Committee and must be submitted within 30 days of the original notice of denial.
5. If a workshop or conference is canceled, written notices are to be sent to the registrants informing them of the cancellation and that any refunds of non-refundable airfares will be limited to the amount charged by the respective airline for changing the ticket.
6. A registration refund policy shall be published with all association conference/workshop materials.

D. Waiver/Reduction of Registration Fee

All persons attending MASFAA sponsored conferences, workshops, special symposiums and seminars will be expected to pay the registration fee. The following people will be entitled to a waiver/reduction of the registration fee:

1. MASFAA President (the President presiding at the opening of the annual conference)
2. Any retired MASFAA member as approved by the current President
3. NASFAA National Chairperson and/or National Chair-Elect
4. NASFAA President
5. Up to two (2) additional NASFAA Central Office Staff members
6. NASFAA Interregional Exchange representative(s)
7. U.S. Department of Education officials
8. Speakers outside the profession (for the appropriate period)
9. Other waivers may be approved by agreement of the President, Vice President and Treasurer.
10. Charging a reduced fee for state hosting conference by allowing Non-Member Registration Fee Differential for Members of a State Association or current members of the MASFAA Local Arrangements Committee from the state that:
 - a. Is hosting the Annual MASFAA Conference in their State and
 - b. The State Association has opted to cancel their fall conference to encourage attendance at the MASFAA Conference
 - c. Even if a state association member's institution is not a member of MASFAA they will still be allowed to pay the Member Registration fee for the conference.

11. The following individuals, who serve as chairs (or co-chairs, if applicable) of the specified MASFAA sponsored events, will also be entitled to a waiver of the registration fee for the specified event only:
 - a. Annual Conference: Program Chair, Local Arrangements Chair, Associate Member Relations Chair and Treasurer-Elect
 - b. Summer Institute: Program Chair and Faculty/Presenters
 - c. Special Symposiums: Local Arrangements Chair and Program Chair
 - d. Chairpersons of other special seminars/workshops established at the discretion of the President

E. Conference Daily Registration Fee

1. The Daily Fee is available to MASFAA members only.
2. The Daily Fee shall be at least 50% of the regular on-time MASFAA member registration fee.

F. Reimbursements, Honoraria, and Travel Expenses

1. MASFAA members who serve as conference speakers/presenters may not be reimbursed for any personal expenses related to the conference (i.e., registration, transportation or room and board) or paid a fee or honorarium. This general policy also applies to individuals who work for agencies whose business is financial aid.

An exception to this policy may be made by the Conference Program Chairperson and President for those members who are non-practicing financial aid administrators who would otherwise not receive reimbursement for their expenses.

2. MASFAA members and non-member presenters may be reimbursed for copying materials if the speakers feel this is necessary.
3. The Program Committee is authorized to pay travel expenses, hotel accommodations and meals for non-member speakers for appropriate periods.
4. The Program Committee will ask if the non-member speakers will charge any additional fees (i.e., honorariums, stipends). Approval of the Program Committee Chairperson is needed before final commitments can be made.
 - a. The following complimentary rooms can be negotiated by the Conference Local Arrangements and Conference Program Committees:
 - i. NASFAA Staff who may attend as presenters
 - ii. Conference Guest Speakers (for appropriate period)
 - b. The following reduced rate (half-price "speaker rooms") can also be negotiated by the Conference Local Arrangements and Conference Program Committees:
 - i. Additional Guest Speakers
 - ii. Discretion of Program and Local Arrangements Chairperson.
5. Receipts are required for all items, including meals, for which reimbursement is requested from MASFAA. The Treasurer and Vice President may approve an expense for which no

receipt is available.

6. MASFAA will allow for an extra night, if the earlier arrival results in cheaper transportation costs that counter the extra room cost.

G. Reimbursements for MASFAA Sponsored Workshops, Special Symposiums, and Seminars

Expenses for MASFAA sponsored workshops, special symposiums, and seminars will be paid by MASFAA for the following individuals who participate in the specific event:

1. Local Arrangements Chairperson, Summer Institute
2. Program Chairperson, Summer Institute
3. Faculty/Presenters, Summer Institute
4. Local Arrangements Chairperson, Special Symposiums
5. Program Chairperson, Special Symposiums
6. Chairpersons of other special seminars/workshops established at the discretion of the President
7. Faculty/Presenters of other special seminars/workshops established at the discretion of the President

H. Reimbursements for Attendance at State Meetings

Travel and meal expenses for the President or designee (not covered by conference registration fees) will be paid by MASFAA for attendance at one state meeting per year in each MASFAA state. All room and conference registration expenses are to be covered by the state association. The MASFAA president or designee will not make travel arrangements until invited by the state and the state agrees to cover registration and lodging costs.

I. Reimbursement for the NASFAA Board of Directors Activities

NASFAA covers the expenses of the MASFAA Past-President, but does not cover the expenses of the MASFAA observer (President) to the NASFAA Board of Directors meetings. MASFAA reimburses the observer expenses utilizing the MASFAA policy and procedures; except, the NASFAA defined per diem will be used rather than the MASFAA per diem. MASFAA will cover the travel expenses of the President's interregional visit and will provide a complimentary registration fee and room for no more than two other regional representatives to attend MASFAA's annual conference or council meeting.

For the NASFAA board meeting that is held in conjunction with the annual NASFAA conference, expenses for the Past President, President, and President Elect shall be paid according to the following:

- Past President—NASFAA pays for the two nights of hotel necessary to arrive early for the board meeting prior to the conference. MASFAA pays all other expenses for the Past President to attend the conference, including registration for the conference, travel expenses, hotel expenses during the conference, meals, transportation, etc.

- President—MASFAA pays for the two nights of hotel necessary to arrive early for the board meeting prior to the conference. The President's school pays all other expenses for the President to attend the conference if he/she chooses to attend the conference following the board meeting.
- President Elect—The President Elect's school pays all expenses for the President Elect to attend the NASFAA Board meeting and/or the conference if he/she chooses to attend the board meeting and/or the conference.

J. Complimentary Room Policy for MASFAA Annual Conferences

Future contracts with hotels will provide for the following (to the extent possible):

1. Suites:
 - a. One Complimentary Suite for the MASFAA President
2. Standard Rooms
 - a. Complimentary for the following:
 - i. MASFAA Local Arrangements Chairperson
 - ii. MASFAA Program Chairperson
 - iii. NASFAA President
 - iv. NASFAA National Chairperson or National Chair-Elect
 - v. NASFAA Interregional Exchange Representative
 - vi. NASFAA Staff who are presenting at the Annual Conference

4.7 Donors and Conference Vendors Policy

A. Policies

1. Donations received from outside organizations at MASFAA conferences will be encouraged by the Association. Vendors and donors will not host meetings that conflict with MASFAA-scheduled activities.
2. The Association shall provide a designated vendor display area at all conferences.
3. Donors and vendors will receive visibility only through Association channels or by direct Association approval.

B. Procedures

The Local Arrangements Committee and Associate Member Relations Chairpersons will be responsible for coordinating functions and activities at the MASFAA Annual conference.

1. Donors:
 - a. Donations will be accepted for all direct expense program items.
 - b. Registration packets will be provided for all donors, even if they are not paid registrants. Meals are not included.
2. Vendors
 - a. Vendors serving the aid profession will be actively invited to display their product/service. Vendors of other products/services may be investigated and invited to display their

product/ service at the discretion of the President, Conference Local Arrangements Committee Chair and Associate Member Relations Chair.

- b. All approved exhibits will be displayed in an area designated for that purpose by the Association.
- c. The distribution of any promotional material by an approved vendor will take place only in the area designated for vendor displays.
- d. There will be no promotional material distributed by any unapproved vendor.
- e. Each vendor will receive credit for his/her participation in the conference program by means of an appropriate sign or placard prominently displayed in the vendor area and by inclusion in an alphabetical listing in the conference program booklet.
- f. The exhibit fee for the vendor display does not include a complimentary conference registration. A separate conference registration is needed.

4.8 Contract Signing Policy

- A. All financial commitments above \$1000 require a written contract. Contracts which are greater than \$5000 require Executive Council approval.
- B. Contracts which involve hotels and/or conference center properties will be reviewed by the Site Selection Coordinator.
- C. Contracts which include non-hotel properties, i.e., printing, supplies, entertainment groups, etc., will be reviewed by the responsible committee chairperson for the activity/event.
- D. The Vice-President signs all contracts. The President will sign in the event that the Vice-President is unavailable.
- E. All work to be done by individuals on a contractual basis must be posted to the MASFAA website and/or Newsletter/Blog so all members have an opportunity to bid to work for the Association. The Association Governance and Planning Committee will annually review all contracts.
- F. An initial contract with an individual is limited to one year but may be renewed annually after review and approval of the Association Governance and Planning Committee.

NOTE: Contract in this policy statement is meant to include purchase orders, letters of intent, and the like.

4.9 Insurance Policy

The Midwest Association of Student Financial Aid Administrators shall be responsible for the purchase of four basic types of insurance in order to safeguard the corporation and its members. Purchase, review and on-going maintenance of association insurance policies is the responsibility of the Association's Vice-President in conjunction with the Finance Committee and President.

A. General Liability

The General Liability Insurance Policy is to protect the Corporation with regard to personal property, valuable papers, income loss, money coverage, fire, medical products, property

damage, advertising liability, host liquor, personal injury, hired and non-owned automobile and blanket contractual.

B. Bonding

All Officers and Trustees of the Corporation shall be covered by a Blanket Dishonesty Bond of at least \$300,000.

C. Director and Officers (D & O) Insurance

D & O coverage includes the Executive Council members if/when they are sued for alleged wrongdoing, including: discrimination, harassment, inefficient administration, waste of assets, misleading reports, libel/slander, failure to deliver services, acts beyond granted authority. The policy shall provide minimum \$1,000,000 coverage.

D. Travel Insurance

Any MASFAA member traveling to or from a MASFAA meeting at MASFAA expense shall be covered by travel insurance. This policy is to cover all Officers, Trustees, Committee Chairpersons, Committee Members, and others engaged in approved MASFAA business.

Current agent for all MASFAA insurance policies (August 2005):

Rust Insurance Agency
910 17th Street NW
Washington, DC 20006
202-776-5020
wsimons@rustinsurance.com

4.10 Internal Controls for MASFAA Funds Policy

The following guidelines are adopted to provide on-going review of MASFAA income and expenses.

1. All MASFAA accounts and reconciliations will be available via QuickBooks on the web. This allows the Finance Committee and other interested parties to review Association transactions at any time. These accounts will be monitored for reasonableness, including a review of cleared checks, deposits, and adjusting entries. A report of income and expenses (including the detail for each budget item) will be made available at least quarterly.
2. The checking account will be reconciled monthly by the Vice President to assure the fiscal integrity of the Association.
3. MASFAA contracts with a CPA individual or firm to prepare our annual federal tax return. The Treasurer provides the firm with all necessary documentation. Commencing with 2011, at a minimum of every ten years MASFAA will contract with an experienced individual or firm approved by the AGPC committee to conduct a formal financial review. Commencing with April 2009, MASFAA Delegates-at-Large will review financial records.

4. MASFAA Delegates at Large will review the books annually except in those years when a full financial review is conducted. The Delegate review of the books will include all bank deposits, withdrawals, and transfers and all reimbursements.
5. MASFAA complies with generally accepted accounting principles in dividing payments and receivables among the Treasurer, Treasurer-Elect, and Vice President.

Financial records will be retained for five years if they are not archived. [The web-based QuickBooks was adopted for bookkeeping in 2003, but Association Quickbooks entries date back to 1997.]

MASFAA Audit Firm (Prior to October 2006):
Meriwether Wilson and Company, P.L.C.
4500 Westown Pkwy, Suite 140
West Des Moines, IA 50266-6717
515-223-0002

MASFAA Tax Consultant Firm (From October 2006 to December 2017):
Wm. Bradley Ogden Certified Public Accountant
802 W. Main Street
Carbondale, IL 62901
618-529-3220

MASFAA Tax Consultant Firm (Since January 2018):
Kenneth Nieman, CPA
3128 West 13th Street
Anderson, IN 46011

4.11 Investment Policy

A. Purpose

The purpose of an investment policy is first to safeguard the funds of the Association and second to produce as high an interest income as possible.

B. Authorization to Invest

The Treasurer in consultation with the Vice President shall be authorized to invest MASFAA funds pending approval and recommendation of the Finance Committee. A US Bancorp investment consultant assists MASFAA in reviewing investment needs and options.

C. Restrictions

The following restrictions apply to MASFAA investments:

1. Investments made in Money Market Funds shall be limited to low-risk funds yielding the highest rate of return.

2. Only the MASFAA Reserve Fund may be invested in Commercial Paper due to the nature of the fund. The Commercial Paper is limited to corporations rated by Moody's at Prime and Standard and Poor's at A-1.
3. Certificates of Deposit (CD's) shall be "laddered" for annual cash flow, as determined by monthly expense projections.

D. Types of Funds Involved

The following MASFAA funds shall be involved:

1. General Fund
2. Reserve Fund
3. Project Development Fund

E. Type of Investments

The Treasurer in consultation with the Vice President is authorized to invest in:

1. U. S. Treasury Bills
2. Certificates of Deposit
3. Short Term Bonds
4. Short Term Notes
5. Mutual Funds offered by TIAA-CREF

Additionally, investments may be made in:

1. Bank Certificates of Deposit
2. Commercial Paper & Deposits in Commercial Banks
3. Money Market Funds
4. Savings Banks

4.12 Scholarship Policy

There are currently two scholarships that are awarded to members attending the Annual Conference. The administration of these awards is the responsibility of the Professional Development Committee.

- A. Haywood Legacy Scholarship--Awarded to one person of color for attendance at the annual conference. Zina Haywood, former MASFAA President, will cover the cost of registration and membership dues in the form of a personal donation. MASFAA will pay for the recipient's room for the annual conference. The selection of the recipient will be made by the Summer Institute faculty and staff. If a qualified recipient decision cannot be made by the Summer Institute faculty and staff, the selection then defaults to the Professional Development Committee.
- B. Annual Conference Scholarships-- Recipients may receive the scholarship one time only and will be provided with a complimentary registration and hotel room. Expenses for the scholarships will be charged to the Professional Development budget. Applicants should be solicited by mid-July and recipients named by August 15th.

4.13 Logo Policy

The official logo of the corporation shows the nine MASFAA states surrounded by an oval which links with the designation "MASFAA" on one line followed by "Midwest Association of Student Financial Aid Administrators" on the next line. Article IV of the Corporate By- Laws restricts use of the MASFAA logo to the Executive Council and their designees in conduct of official Corporation business. The Secretary shall have responsibility for maintaining the official logo.

Logos are often developed for MASFAA conferences, events and programs. These logos are not registered or trademarked. Use of these logos requires the approval of the committee chair for the specific event/activity or the MASFAA President.

4.14 Officer Travel Policy

A. State Association Meetings

1. Several times during the course of a membership year, MASFAA Officers are requested to make appearances at state meetings. Such requests should be directed to the MASFAA President. MASFAA encourages this interaction with the individual states, and therefore assumes a partnership role between the state and the region to subsidize the cost of the MASFAA representative to be present at a state association meeting. In order to reduce the travel demands on the MASFAA President, the MASFAA representative for state association meetings will rotate between the President, Past President, or President-Elect. A schedule will be designed so that each officer attends each state meeting at some point during their tenure.
2. Any state that requests the presence of the MASFAA President or designee, does so with the understanding that MASFAA assumes only the costs associated with travel and meals (not covered by conference registration fees). The MASFAA president or designee will not make travel arrangements until invited by the state and the state agrees to cover registration and lodging costs.
3. All other expenses are to be covered by the state association.

B. NASFAA Leadership Conference

MASFAA will, at the discretion of the Executive Council, pay all associated expenses for up to two MASFAA members to attend the NASFAA Leadership Conference. Consideration should be given to sending the president-elect, treasurer-elect and other officer as determined by the executive board.

C. Corporate Debit Card Authorization and Usage

Because of the amount of travel required by the Past-President, President and President-Elect on behalf of the association, and the Vice President need to pay for a variety of MASFAA business expenses, MASFAA has authorized the use of a MASFAA PNC Bank Visa Business Travel card with a limit of \$5000 for these four— on an annual basis. The Treasurer is responsible for canceling/authorizing corporate debit cards with PNC Bank each year.

1. When filing an expense claim for travel expenses having used the MASFAA PNC Bank Visa Business Travel Card, all credit card receipts must be submitted with the MASFAA Expense/Reimbursement Claim Form to the Vice President itemizing all expenses charged to the Visa Card. The Vice President submits claim forms to the President. These forms requesting payment are forwarded to the Treasurer.
2. All expenses not charged on the MASFAA Visa Card must be submitted on a separate Expense/Reimbursement Claim Form and submitted with proper documentation.

D. Travel Arrangements for MASFAA Sponsored Events

Executive Council members and other MASFAA members should make their own travel arrangements, pay for them, then request reimbursement from the Vice President or appropriate committee chair. If a MASFAA member is unwilling or unable to pay for their travel arrangements, the Vice President can use the MASFAA credit card to make the payment. In this case, the member should clearly identify the flights that comprise the travel itinerary.

4.15 Project Development Fund Policy Purpose

The Project Development Fund (PDF) was established to serve as a reserve for special projects funding.

Any MASFAA Committee or member state may submit a request for PDF to the Finance Committee. The Finance Committee will review all requests with all assignments of funds to be made by the Executive Council.

A. Fund Levels

Funds not assigned in any given year may be carried forward to subsequent year(s).

B. Request for Special Projects

Requests for Project Development Funds must come from a MASFAA Committee Chairperson, MASFAA State Delegate or a member of the MASFAA Executive Council. A sample request form appears on the following page.

The special project must be identified by name and purpose. The project shall be for the benefit of the entire Association. A committee requesting funding must identify the project as being within the scope of their committee work. A state submitting a request may identify any project it wishes to pursue as long as it directly or potentially benefits all MASFAA states.

All requests for PDF funding must contain complete cost breakdowns. If the project is a publication, the cost of publication and distribution also must be included.

C. Approvals

The Finance Committee will review the requests for funding based on such things as costs, intended purpose, beneficiaries, and any other such factors that may affect the entire membership.

The Finance Committee will make recommendations to the Executive Council for funding. The Executive Council will either accept or reject the Finance Committee recommendation. The President shall acknowledge all requests.

D. Unapproved Requests

Requests which are not approved may be modified and resubmitted immediately or submitted for consideration in original form at a later date.

E. The Project Development Fund Account

The Project Development Fund shall be so identified and managed according to sound financial investment policies.

MASFAA Project Development Fund Request for Funding

Purpose

Each year MASFAA designates funds to be used for special projects proposed by various committees or states. The purpose of the fund is to provide a mechanism whereby meaningful projects may be implemented during a year but no funds were originally budgeted for the project. Please answer each question completely but in a concise manner. Use additional paper if necessary. Submit this report to the current MASFAA president.

Fund Proposal

1	Name of committee, state, individual, requesting funds.
2	Primary contact regarding this request: Name Institution Address City, State, Zip Telephone ()
3	Amount requested \$_____ for the period _____ to _____
4	Purpose and scope of the project. (What will it accomplish? What work is planned? How will it operate?)
5	Describe how this project will benefit MASFAA and its members
6	Describe how the progress of this project will be evaluated.
7	Prepare a budget detailing proposed expenditures to include publications, personnel, travel, etc.
8	Describe the source of funds, if appropriate, that will be used to supplement funding for this project.

9	Describe the future funding implications to MASFAA for this project, if any.
Request for Fund Submitted by _____	
Institution _____	
Signature _____ Date _____	
Address _____	
City, State, Zip _____	
Telephone () _____ Fax () _____	

4.16 Property and Equipment

Any property or equipment of the association shall be properly disposed of or offered to a charitable organization as determined by the Finance Committee. Computers, printers and other electronic devices which contain MASFAA information or data should be wiped clean prior to disposal or donation.

4.17 Reimbursement Policy

MASFAA will reimburse a committee chairperson, committee member and the Executive Council member for expenses related to service to MASFAA. These expenses must be directly related to a committee meeting to be paid by MASFAA.

MASFAA does not cover the cost of internet access paid for by a MASFAA member during Executive Board or other official meetings (such as committee meetings), except by specific authorization by the President and then only for official MASFAA business purposes.

MASFAA does not cover telephone calls made by MASFAA members during official meetings, except when made to conduct MASFAA business.

MASFAA will cover costs charged for changing airline reservations if the change is necessary for Association business. MASFAA does not cover costs charged for changing airline reservations if the change is done for personal reasons, without prior permission of the President or Vice-President. Any members seeking refund or airline change fee reimbursement must submit a written request to the Vice President to be reviewed by the Finance Committee.

In order to reduce costs and logistical arrangements, committee chairpersons should consider scheduling meetings in conjunction with other MASFAA sponsored events whenever possible (i.e., Annual Conference, Symposium, Summer Institute, etc.). Chairperson also should consider scheduling meetings in conjunction with non-MASFAA sponsored events when appropriate (i.e., NASFAA Annual Conference, Regional College Board Meeting, etc.). If a MASFAA member attends a meeting as a committee member AND as a MASFAA Board Member, the executive committee will cover expenses. To minimize the number of hotel nights reimbursed by the association, members should anticipate traveling on the day of the meeting. Requests to cover hotel costs for the night before a meeting must be approved in advance by the President.

MASFAA members requesting reimbursement may submit an electronic copy of the reimbursement form and documentation of expenses. Original paper copies are no longer required.

The following policy will be in effect for reimbursement of travel expenses (defined as meals and lodging, and transportation) for committee members and Executive Council members:

For a Non-MASFAA Sponsored Event:

Travel expenses will not be reimbursed by MASFAA for a MASFAA committee chairperson, committee member or Executive Council member when MASFAA meetings are held in conjunction with non-MASFAA sponsored events. It is assumed that the convener will be participating in the non-MASFAA event and that the home institution will be paying the travel and related expenses for attendance at the meeting.

For a MASFAA Sponsored Event:

MASFAA will reimburse a MASFAA committee chairperson, committee member or Executive Council member for travel expenses not directly associated with attendance at the planned MASFAA activity.

(Please note: Committee chairpersons should not expect a committee member to attend a non-MASFAA sponsored event in order to attend a MASFAA Committee meeting.)

The mileage reimbursement rate will be reviewed and determined annually at the start of each fiscal year to reflect current IRS rates in effect at that point in time.

Guest policy:

Any additional lodging or meal costs resulting from guests of board members must be covered by the guest and cannot be paid or reimbursed by MASFAA.

4.18 Reserve Fund Policy

Purpose

The Reserve Fund has been established as capital reserve to be set aside for contingencies and unexpected budgetary shortfalls. For example, MASFAA may face a contractual liability if conference attendance is less than needed to meet our room guarantee.

Fund Levels

The association will set aside a sufficient amount of funds necessary to cover all outstanding contractual obligations. It is anticipated that two years will allow MASFAA enough time to reassess the association budget and either reduce expenditures or find additional resources.

Use of the Reserve Fund

If the Association's reserve exceeds \$300,000, the Executive Council shall determine how best to use available funding to serve the membership. The Executive Council shall first look at decreasing the registration fees of the annual conference and Summer Institute and secondly look at reducing association membership dues. If possible, any use of the reserve shall be done in a prudent manner to make any registration and/or dues reduction long-term rather than short-term.

The Reserve Fund Account

The Reserve Fund shall be so identified and maintained in a separate interest bearing account and be separate from the Association's checking account.

4.19 Resolutions Policy

A. Origin of Resolutions

Resolutions may originate, be developed, and submitted by any individual MASFAA member alone or in concert with other(s) directly to the MASFAA Association Governance and Planning Committee or through any of the following channels:

1. Member State Associations;
2. Any member state committees and/or their chairperson;
3. MASFAA's Executive Council;
4. Individual members listed as a member through a MASFAA member institution.

B. Time of Submission

Ordinarily, resolutions should be submitted to the MASFAA Association Governance and Planning Committee (to the chairperson and/or any member) at least one month in advance of the annual MASFAA meeting. This is necessary in order for the committee to properly review, edit, and combine the various proposals submitted. Resolutions will not be accepted after this deadline unless the Association Governance and Planning Committee deems the circumstances warrant a late submission.

C. Form and Content

The resolutions must be prepared with care so as to avoid ambiguity and confusion as to its content. The resolution, as well as any introductory remarks, should be concise and as briefly stated as possible.

D. Editing Privileges and Responsibilities

1. The Association Governance and Planning Committee must review and clear all resolutions to prevent proposals opposed to MASFAA's Articles of Incorporation and By-Laws.
2. Although the Executive Council is not authorized to reject any resolutions cleared by the Association Governance and Planning Committee, it is responsible for eliminating duplication, combining related proposals, and editing for corrections, brevity, and clarity.

4.20 Revenue and Expenditures Policy

Because MASFAA's financial affairs are complex; it is essential that all MASFAA funds be managed by the Treasurer/Treasurer-Elect, all income deposited into a MASFAA account, and all expenses paid from one account. This will simplify and expedite the filing of the IRS tax return and the annual review or audit. It also facilitates cash flow and maximizes interest income. The following outline details specific policies and procedures with respect to MASFAA's funds management.

- A. The Treasurer and Treasurer-Elect shall have responsibility for all of MASFAA's financial transactions including:
 1. All check writing (performed by the Treasurer)
 - a. Issuing all refunds
 - b. Payment of all expenses
 2. Receiving of all income (performed by the Treasurer-Elect)
 3. Reconciliation of bank statements (coordinated with the Vice President)
- B. Checking Accounts
 1. MASFAA shall have only one checking account
 2. Account owners shall include:
 - a. Vice President
 - b. Treasurer-Elect
 3. Signatories shall include:
 - a. Treasurer
 - b. Treasurer-Elect
 - c. Vice President
 4. The address of the Vice President shall appear on the account.
 5. ALL MASFAA income and expenses shall pass through this account
 - a. All deposits will be made in a timely manner

- b. Accounts payable shall be made within 30 days. (Maximize interest income to the extent possible.) Every effort will be made to reimburse individual MASFAA members as quickly as possible.
6. Recommended checking account balances should reflect the minimum amount to avoid checking account penalties and meet current obligations. The Treasurer shall monitor the checking account balance in relation to anticipated expenditures and the MASFAA investment policy.

The MASFAA Secretary, as holder of the minutes, will authorize the names of those officers who will be listed on the signature card with the MASFAA bank.

C. Annual Conference Income and Expenses

1. Income (registration fees, vendor income, etc.)
 - a. Shall be forwarded to the Treasurer-Elect within 5 working days for deposit to the MASFAA Checking Account
 - b. The Local Arrangements Committee shall identify the sources of the income, i.e., registration fees, vendor income, membership dues, pre- conference income, etc.
2. All conference expenses shall be paid from the MASFAA checking account. Completed, signed, and dated reimbursement forms shall be attached to all invoices, contracts, etc.
3. Petty cash needs for the conference (no earlier than 30 days prior to the activities)
 - a. Requested by the Local Arrangements Committee Chairperson (on Reimbursement Form), approved by Vice President
 - b. Check shall be payable to Local Arrangements Committee Chairperson (not to exceed \$1,000 for the entire conference)
 - c. Local Arrangements Committee Chairperson is responsible for reconciling (with receipts) petty cash within 10 working days after conference

D. Workshop Income and Expenses

1. Income
 - a. All checks received are to be made payable to MASFAA.
 - b. Received by the workshop or arrangements coordinator.
 - c. All funds will be forwarded to the Treasurer-Elect within 5 working days for deposit to the MASFAA Checking Account.
 - d. Under no circumstances will an agency/institution be allowed to receive and hold MASFAA funds, deduct MASFAA expenses, and remit the excess income to MASFAA.
2. Expenses--Same as C-2 above (conference expenses).

E. Conference and Workshop Accounts Receivable

1. Within 30 days after the conclusion of the event, the event coordinator shall submit to the Treasurer-Elect a complete list of outstanding accounts.
 - a. The Treasurer-Elect shall be responsible for billing and collecting these funds according to the MASFAA Accounts Receivable Policy.

F. Membership Dues Income

1. Received by Membership Services with a membership form.
2. Deposited in a timely manner to the MASFAA checking account.

4.21 Tax Exemption Policy

MASFAA is a tax-exempt organization as classified under Internal Revenue Service Code 501 (c) (3) and is exempt from the payment of various federal and state taxes including the common sales tax.

Effective January 1, 1984, it is the responsibility of each officer, committee chairperson, and committee member to follow through on this exemption. When making purchases or contracting for services, the MASFAA representative must advise the vendor of the MASFAA tax exemption in advance. By doing this it will preclude any charges containing sales tax. You may be required to show proof of the tax exemption or to provide our Federal Employer Identification Number (EIN)—34-1452645—which is on the IRS letter 1045(DO)(10-83) on MASFAA website.

Since MASFAA is now tax exempt, it will not reimburse for any inadvertent sales tax charges that appear on the MASFAA Reimbursement Claim Form. It is requested that you review all charges carefully and if in doubt to contact the MASFAA Treasurer or Finance Committee chairperson.

MASFAA is also exempt from state sales tax in the following states: Indiana, Missouri, Ohio, Wisconsin, and West Virginia.

4.22 Stale Check Policy

- A. All MASFAA checks will be voided after 90 days. If a check becomes void, it is the payee's responsibility to request in writing that a duplicate be issued. Such requests will be sent to the Treasurer. If no request is received, the check will be declared "stale."
- B. A stale check that is later reissued will be charged to:
 1. The same account from which it was originally issued if the fiscal year records are still open.
 2. An account in the current year titled "Prior year(s) expenditures" when the stale check is from a closed prior fiscal year.
- C. Voided checks can be located in Quickbooks as needed to reissue upon the request of the payee.

NOTE: By declaring a check stale, MASFAA is not relinquishing its obligation to the payee. In other words, MASFAA does not deem it necessary to remind the payee to cash a check.

4.23 Vendors, Donors and Exhibitors Refund Policy

In the event of cancellation of the Conference due to fire, strikes, government regulations or other causes beyond MASFAA's control, MASFAA shall not be liable for failure to hold the Conference

as scheduled, and MASFAA shall determine the amount of exhibit fees to be refunded. In the event of cancellation by an exhibitor, a 50% refund will be granted if notice of cancellation is received in excess of 60 days prior to the Conference and no refund will be made for cancellation within 60 days of the Conference.

MASFAA, through its Executive Council, shall have sole authority to interpret and enforce all rules and regulations contained herein and to make any amendments as shall be necessary for the orderly conduct of the Conference.

4.24 President's Stipend

At the conclusion of the President's term of office and at the beginning of the next fiscal year, the Treasurer will issue a check in the amount of \$3,000 to the President's institution. The purpose of this stipend is to recognize that the institution may have incurred expenses related to the President's participation and help defray those costs.

4.25 Web Policy

Purpose: The primary purpose of the MASFAA Web site (www.masfaaweb.org) is to be a reference and resource tool for MASFAA 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 by offering electronic/interactive tools (such as online forms). A secondary purpose of the Web site is to provide resources for non-members, parents, and students seeking information on financial aid. Every effort will be made to ensure the Web site reflects the Association's mission and goals.

Sections of the Web site may include, but not be limited to:

- Association Information (By-Laws, Articles of Incorporation, listing of Executive Council Members)
- Membership Information (benefits of MASFAA membership, online membership form, online volunteer form)
- Event Listings (Annual Conference, Summer Institute, Professional Development Symposiums, State Association Conferences)
- MASFAA Members Area (online Membership Directory, Newsletters/Blog, and other members-only information)
- Committee Updates (Nominations and Elections, Awards)
- Links/Resources for Students and Parents (links to the Department of Education, NASFAA, FinAid)

Every effort will be made to ensure all pages have a consistent look and feel and that all pages are copyrighted by MASFAA. All pages should also give a contact email address for the Webmaster or another designated member of the MASFAA Electronic Services Committee.

To ensure the safety and security of the site, the Web server/hosting space must be purchased on behalf of MASFAA (in MASFAA's name). A copy of the Web hosting information (where the hosting server is located) and the password/access information to the server space must be available to/on file with at least three MASFAA members including the Electronic Services Committee Chair, the Electronic Services Committee's Delegate- at-Large, and the Vice President.

There will be a designated Webmaster, who performs the duties prescribed by the Electronic Services committee. The URL address (www.masfaaweb.org) should remain consistent regardless of change in webmaster or web host. MASFAA currently contracts with Wild Apricot, 144 Front Street West, Suite 725, Toronto, Ontario M5J 2L7 Canada for web hosting. The Chair acts as the Webmaster.

The Research and Archives Committee Chair will act as the main point of contact between the Executive Council and/or MASFAA Committees (all information to be posted to the Web site should be submitted to the Research and Archives Committee Chair).

Advertising on the Web Site: Ads can be displayed on the main page. Advertising will be open only to businesses that deal specifically with the financial aid community. Advertising rates will be established in conjunction with the Associate Member Relations Committee. Web advertisements will be used to help offset costs of developing/maintaining the Web site.

MASFAA provides a listserv as a service to members and participation on the listserv is voluntary. By remaining subscribed to the list, users understand that content and opinions expressed on the listserv are those of the author and do not necessarily reflect the positions of MASFAA. Marketing language, advertising, and/or promotional messaging is strictly forbidden. Listserv users should avoid profanity, harassment, and/or disparagement of others. MASFAA reserves the right to remove individuals from the listserv and/or terminate membership if found in violation of these terms.

4.26 Merchant Account (eCommerce)

MASFAA currently [as of August 2017] holds a non-profit contract status with PayPal (www.paypal.com) to provide the internet gateway for enabling online payments by members via our website.

The Treasurer-Elect will monitor our PayPal account for any credit card payments to batch to the bank.

4.27 MASFAA State Exchange Program

In cooperation with the state associations, MASFAA funds a State Exchange Program that allows the state representative serving on the MASFAA Board to visit another state association conference or meeting each year. Exceptions to the designated state representative may be

brought to the State Issues and Conference Liaison Committee Chair for consideration. The State Exchange Program is designed to allow state association leaders the opportunity to learn how other associations conduct business as well as expand their leadership network. Participants must hold MASFAA Institutional member status. The host State Association agrees to cover the cost of the conference registration and hotel. MASFAA will cover travel and other reimbursable expenses (as defined in section 4.17) up to \$650. State associations are expected to reimburse state representatives for expenses greater than \$650.

The following is the MASFAA State Exchange Program schedule:

State	2019-20	2020-21	2021-22	2022-23	2023-24	2024-25	2025-26	2026-27
	Visits	Visits	Visits	Visits	Visits	Visits	Visits	Visits
IL	MO	OH	WV	WI	IN	IA	MI	MN
IN	OH	WV	WI	IL	IA	MI	MN	MO
IA	WV	WI	IL	IN	MI	MN	MO	OH
MI	WI	IL	IN	IA	MN	MO	OH	WV
MN	IL	IN	IA	MI	MO	OH	WV	WI
MO	IN	IA	MI	MN	OH	WV	WI	IL
OH	IA	MI	MN	MO	WV	WI	IL	IN
WV	MI	MN	MO	OH	WI	IL	IN	IA
WI	MN	MO	OH	WV	IL	IN	IA	MI

4.28 MASFAA President/Past-President/President-Elect Conference Rotation

State	21-22	22-23	23-24	24-25	25-26	26-27
Illinois	PE	PE	PE	PP	P	PE
Indiana	P	P	PE	PP	P	PE
Iowa	PP	PP	PP	P	PE	PP
Michigan	PP	P	P	PE	PP	P
Minnesota	PE	PP	P	PE	PP	P
Missouri	PP	PE	PP	P	PE	PP
Ohio	P	PE	PP	P	PE	PP
West Virginia	P	P	PE	PP	P	PE
Wisconsin	PE	PP	P	PE	PP	P

Key: PE = President-Elect P = President PP = Past-President

4.29 Renewal of Non-Profit Status Procedure

Every five years, MASFAA is required by the state of Ohio to renew its non-profit status. This process requires the naming of a “statutory agent”. The agent must be an Ohio resident.

4.30 Best Practices for Session Presenters at Annual Conference

The conference program committee will strive to offer sessions presented by regular members of the association. There are also topics within the financial aid profession that MASFAA’s associate members are equally, or more so, qualified to offer. To preserve a balance in school member and associate member presenters, MASFAA will strive to ensure that non-Business Solution Sessions are presented by an Institutional School member, employed by a higher education institution, or co-presented by an Institutional School member, employed by a higher education institution, and an Institutional Associate member, employed by an entity other than a higher education institution.

In an effort to meet this goal, MASFAA recommends the following:

- If a presentation template is provided by MASFAA, all non-business solution sessions will be presented on the template provided by MASFAA.
- Interest sessions will be presented by an Institutional School member or co-presented by an Institutional School member and an Institutional Associate member.
- All presenters should equally contribute toward and be recognized for the session.

Interest sessions are non-proprietary, topic-driven sessions that focus on financial aid policy and practice, leadership development, professional practices, or other topics that meet the professional development needs of the MASFAA membership. Business solution sessions are designed as a promotional opportunity for associate members to showcase a specific product or service.

4.31 Conducting Business Electronically

MASFAA allows business to be conducted through the use of any means of communication by which all board members may participate and share in the exchange of information amongst all members.

Business brought to the floor through any electronic means must be presented to MASFAA board members with a minimum of 5 business days notice.

In the event of an electronic vote, the President will present the item of business at hand and call for a motion related to that business. Once a motion has been made and seconded, the motion on the floor will be acknowledged by the Secretary and the discussion period will begin. The President shall determine the length of the discussion period but it shall be a minimum of 48 hours.

The Secretary will acknowledge the end of the discussion period after which the President will call for a vote. The President shall determine the length of the voting period but it shall be a minimum of 48 hours.

At the President's discretion, the discussion may be tabled until a conference call or in-person meeting is scheduled.

5.0 Nominations and Elections Guidelines

Strong leadership is essential to a strong association. The following guidelines have been developed to ensure that qualified people are nominated and elected to office.

5.1 Authority

Nominations and elections policies and procedures are approved by the Executive Council upon the recommendation of the Nominations and Elections Committee.

5.2 The Nominations and Elections Committee (NEC)

The responsibility for determining the procedures, the conduct, and the oversight of nominations and election belong to the Nominations and Elections Committee (NEC). The composition of the Committee shall be as follows:

Chairperson: Past President

Members: President-Elect and four MASFAA Members

Tenure: One Year

Qualifications: Persons should be representative of and be well acquainted with a significant portion of the membership.

5.3 Nominations Procedures

There are many tasks that must be accomplished so that qualified people will be nominated and to provide the best possible candidates for election. In developing the slates of candidates for positions in MASFAA, the Association is committed to strive for the widest participation possible by all members of the Association. In order to achieve this objective, the procedures shall be as follows: By January, there shall be published in, electronic media the Web, or other medium as appropriate, information about the nominations and elections procedures. Included in electronic media or appropriate medium must be a listing of the NEC members, the positions for which nominations are sought, nominating procedures, election procedures, and the requirement that persons nominated must hold regular membership in the Association.

5.4 Candidate Eligibility

Each nomination submitted should be accompanied by the MASFAA Nominations and Elections forms designated for this purpose. All persons nominated must hold Institutional School membership status and be in good standing per the By-Laws. Individuals employed by member institutions who are engaged in the supervision of a financial aid office are eligible to be nominated for and hold elected office.

5.5 Submission of Nominations

Nominations from the MASFAA members shall be submitted in writing to the NEC Chairperson and received by February 15.

The NEC may seek additional candidates throughout the nomination process as needed in consultation with all members of the NEC.

5.6 Developing the Slates of Candidates

1. The Chairperson will certify the nominees eligible for nomination and shall reproduce the information received on nominees and distribute it to each member of the NEC as they are received.
2. If a resume and, if necessary, a statement of candidacy are not received by the deadline date for printing the ballot, the candidate will not be considered for a place on the ballot. The NEC should follow up with all candidates to reconfirm their willingness to run for office.
3. The NEC shall develop the official slate no later than March 15. Nominees may be selected from among those names submitted by others or from a list of names that the NEC has developed. Additionally, the following two policies shall apply to all offices:
 - a. Ideally, the slate should contain the names of two candidates per office.
 - b. To achieve broad and equitable balance in selecting the candidates for each office, the NEC will study the qualifications of individuals and representation by types of institutions, states, ethnicity, and gender and will select the most qualified individuals.

5.7 Elections Procedures:

Ballots must be prepared and distributed in accordance with the following provisions:

1. Ballots shall be offered in an electronic format.
2. Ballots shall have a space provided for the write-in of candidates.
3. Information accompanying the ballots shall include:
 - a. A resume of not more than one page for each candidate nominated.
 - b. Candidates for President-Elect shall provide a candidate statement of not more than one page.
 - c. Voting instructions with the deadline date clearly indicated.
 - d. Any other information that the NEC deems appropriate.

5.8 Schedule of Voting

Voting materials shall be provided to all voting members no later than April 1. Members may be directed to the Web to view candidate information.

Ballots must be received by the Chairperson of the NEC no later than fourteen (14) days after they are distributed or made available.

5.9 Counting of Ballots

1. The ballots shall be counted and the determination of results made no later than June 1. Note: Because MASFAA currently uses Wild Apricot, which allows electronic voting – all votes are electronically tabulated by Wild Apricot and can be reviewed by the chair on a minute by minute basis if so desired.
2. The Chairperson of NEC should be responsible for verifying and tabulating the results of the election. The ballots must be kept until approval by the membership to destroy the electronic ballots is obtained at the MASFAA Annual Conference business meeting.

5.10 Required Number of Votes to Win

For any position covered by these Guidelines, the number of votes required to win an election is a majority of the votes cast.

In the event of a tie for any elected office other than delegate, a runoff election will be held for those position(s). The voting period for the runoff election will be 7 calendar days of the vote being opened.

In the event of a tie for the delegate position where MASFAA will be filling two offices, a runoff election will be held as follows:

1. If there are 2 open positions and the tie is between the 2 candidates with the highest votes, those 2 candidates fill the 2 open positions and no runoff election is needed.
2. If there are 2 positions open and the tie is between the 2nd and 3rd candidate with highest votes, a runoff election will be held between those 2 candidates.
3. If there are more than 2 delegate positions open, the logic above would continue to be applicable.

In the event of a tie in a runoff election for any position, a quorum of voting members of the current board shall vote for the open position within 7 calendar days of the vote being opened.

In the event of a tie after a runoff election, position will be determined by coin flip of Nominations and Elections chair and a witness.

5.11 MASFAA Nominations and Elections Committee Calendar

December/January	Disseminate nominations and elections information to the membership via electronic media and the Web or any other appropriate medium.
February	Continue to solicit nominations and correspond with the Committee to assess the progress of the nomination process. All nominations should be received by February 15.
March	The Nominations and Elections Committee will develop a final slate of candidates and contact candidates to obtain their approval for their names to be placed on the ballot. Resumes and statements of candidacy will be requested from the candidates.
March	Prepare ballot and candidate information.
March	Make ballots available to all eligible members of MASFAA and allow 14 days for voting.
April/May	Tabulate all ballots and notify all candidates.
April/May	Notify Executive Council of results.
April/May	Send results to the Electronic Services Committee for publication in the next Newsletter/Blog. Also send results to the Electronic Services Committee for immediate publication on the Web.
October	Submit a motion at the MASFAA Annual Conference business meeting to destroy the voting records.

5.12 Replacing Elected Officers Who Resign

If a person elected to a MASFAA position resigns the position before the end of the term for that office, the President may charge the Nominations and Elections Committee to conduct a special election for the position or may replace the person by appointing another member who holds Institutional status and is in good standing per the By-Laws. Special elections are run in a similar manner as regular elections.

If a person elected to a MASFAA position resigns the position before their term begins for that office, the President may charge the Nominations and Elections Committee to conduct a special election for the position or the President may replace the person by appointing another member who holds Institutional status and is in good standing per the By-Laws. The President, in

consultation with AGPC, shall make this decision based upon factors such as the number and qualifications of candidates in the original nomination pool and the amount of time remaining before the term of the vacant office is to begin. The President’s decision to appoint or require a special election shall be taken to the executive council for approval.

Persons appointed to fill vacated positions of elected MASFAA officers assume all rights and responsibilities of the position. They are expected to carry out the responsibilities for the balance of the elected term. These individuals are eligible to enter into candidacy for the same or other position in any MASFAA election.

6.0 Awards—Policies, Procedures and Guidelines General Information

The Midwest Association of Student Financial Aid Administrators will recognize individuals who have provided service or made significant contributions toward the aims and ideals of the financial aid profession in the nine-state MASFAA region. This recognition may be for a single event or accomplishment or can reflect a lifetime or a long period of sustained effort.

The format of MASFAA awards will vary based on a number of factors, including the type of award and method of presentation, with the particular format for each award determined by the Awards Committee. Typical formats include plaques, gift cards, listing in conference booklets, donations to charitable organizations, and letters of recognition.

The policies and procedures following in this section are meant to be used as guidelines to describe and list the MASFAA Awards process. A complete description is provided for each award. AGPC will review award recipient information before awards are finalized.

A summary is provided below to indicate the relative importance of each award and to determine who selects the recipients:

Awards	Who Selects
Alan W. Purdy Distinguished Service Award	Awards Committee
Outstanding New Professional Award	Awards Committee
Meritorious Service Award	Awards Committee
MASFAA State Leadership Award	Awards Committee
Award of Appreciation	Awards Committee
President's Award	President
Committee of the Year Award	President
Student Success Story of the Year Award	Awards Committee

40 Year Service Recognition	Automatic
35 Year Service Recognition	Automatic
30 Year Service Recognition	Automatic
25 Year Service Recognition	Automatic
20 Year Service Recognition	Automatic
Recognition of Retirement	Automatic
Honorary Membership Award	Executive Council
Lifetime Membership Award	Executive Council
Nominations for NASFAA Leadership Award	Presidents Council

In addition to these traditional awards, Executive Council may choose to award Lifetime or Honorary Membership in recognition of service to MASFAA.

Recipient listings are posted on the website.

ALAN W. PURDY DISTINGUISHED SERVICE AWARD	
The Description:	The Alan W. Purdy Distinguished Service Award is the highest award, which MASFAA bestows and is presented annually.
The Criteria for Selection:	Since this award is the highest which MASFAA bestows, individuals elected to receive it must have made outstanding achievements to the Financial Aid Profession and to MASFAA goals. Their career in the profession and within education itself must demonstrate service to fellow professionals, students and those other publics served by the professional aid administrator. This award's key criteria is based on significant contributions over a period of time and is not typically given for a single contribution. The recipient must be a member who holds Institutional or Associate member status and is in good standing per the By-Laws.
The Selection:	Nominations for this award are solicited from the general membership and the MASFAA Executive Council. The nominations are returned to the MASFAA Awards Committee for consideration. The Awards Committee will evaluate each nomination and hold discussion on the merits of the potential recipient. The Awards Committee shall have the prerogative to request additional information on the nominee, if necessary, from the person doing the nominating. The Awards Committee shall also verify any details in question. The Awards Committee will determine who is selected to receive the award based upon

	the nominee's qualifications.
The Presentation:	The Alan W. Purdy Distinguished Service Award is announced and presented at the MASFAA Annual Conference during the Awards Banquet. If the recipient is not in attendance, the award shall be forwarded to the recipient. Traditionally, this award is presented to the new recipient by the most recent previous recipient, if available.
OUTSTANDING NEW PROFESSIONAL AWARD	
The Description:	The outstanding new professional award is given annually to recognize the outstanding contributions of a new professional to the financial aid profession.
The Criteria for Selection:	The awardee must have been in the profession for less than five years and made outstanding contributions at the institutional, state, regional and/or national levels.
The Selection:	Nominations for this award are solicited from the general membership and from the MASFAA Executive Council. The nominations are forwarded to the MASFAA Awards Committee for evaluation and discussion of the merits of each nominee. If necessary, the Awards Committee will obtain additional information on the nominee from the person making the nomination. The Awards Committee may also verify any details in question. The Awards Committee will make the final determination on the basis of the nominee's qualifications.
The Presentation:	The award is announced and presented at the MASFAA Annual Conference. If the recipient is not in attendance, the award shall be forwarded to the recipient. The President usually presents this award.
MERITORIOUS SERVICE AWARD	
The Description:	The Meritorious Service Award is presented on an optional basis and is considered to have an extremely high value.

The Criteria for Selection:	<p>This award is considered to be of extremely high importance and therefore the recipient must have made significant contributions to the profession, association(s) or education in general. The selection is based upon leadership or work on special projects. It is not required that these projects last for the entire year or for an extended length of time; they could also be for a single accomplishment.</p> <p>Nominees may be Financial Aid administrators or people from related fields who merit consideration. The recipient must be a member who holds Institutional or Associate member status and is in good standing per the By-Laws.</p>
The Selection:	<p>Nominations for this award are solicited from the general membership and the MASFAA Executive Council. The nominations are returned to the MASFAA Awards Committee for consideration. The Awards Committee will evaluate each nomination and hold discussion on the merits of the potential recipient. The Awards Committee will obtain information on the nominee, if necessary, from the person doing the nominating. The Awards Committee shall also verify any details in question. The Awards Committee will determine who is selected to receive the award based upon the nominee's qualifications.</p>
The Presentation:	<p>The Meritorious Service Award is announced and presented at the MASFAA Annual Conference during the Awards Banquet. If the recipient is not in attendance, the award shall be forwarded to the recipient. The members of the Awards Committee will present this award.</p>

MASFAA STATE LEADERSHIP AWARD

The Description:	<p>The MASFAA State Leadership Award is presented annually to recognize the outstanding leadership of a member from each of the nine (9) states within MASFAA.</p>
The Criteria for Selection:	<p>The recipients, who must hold Institutional or Associate member status and are in good standing per the By-Laws, must have made outstanding contributions to the financial aid profession at the state and regional levels over a sustained period of time (i.e., seven or more years). Leadership at the regional level is not the only criterion for this award, and the selection process will not be limited to current state elected leaders. The individuals selected for this award must: exhibit high integrity and character; have shown creative leadership; have inspired and encouraged others to participate actively in professional development activities; have sustained active involvement in professional organizations; and have supported the goals and</p>

	objectives of MASFAA.
The Selection:	Nominations for this award will be requested from each state's current Executive Council. MASFAA members may nominate individuals they believe meet the criteria and should be considered for the award to the President of the state in which the nominee resides. The state's current Executive Council should submit no more than three (3) nominations. The Awards Committee will determine who is selected to receive the award from each state based upon the nominee's qualifications.
The Presentation:	This award will be announced at the MASFAA Annual Conference. The President or designee will present the award at the recipient's state conference.
AWARD OF APPRECIATION	
The Description:	The MASFAA Award of Appreciation is presented as deemed necessary to recognize significant contributions made to MASFAA and the financial aid community and is considered to have an extremely high value.
The Criteria for Selection:	The individual selected need not be a MASFAA member or a financial aid administrator, but may come from the political, educational, business or other communities. The individual selected to receive the award must have made outstanding achievements in the furtherance of MASFAA's goals and have made significant contributions over a sustained period of time, except when a single contribution is of such momentous importance that it deserves this award.
The Selection:	Nominations for this award will be requested from the general membership and the MASFAA Executive Council. The Awards Committee will evaluate each nomination and hold discussion on the merit of the potential recipient. The Awards Committee will obtain information on the nominee, if necessary, from the period doing the nominating and will also verify any details in question. The Awards Committee will determine who is selected to receive the award based upon the nominee's qualifications.
The Presentation:	This award will be announced and presented at the MASFAA Annual Conference during the Awards Banquet. If the recipient is not in attendance, the award shall be forwarded to the recipient. A member of the Awards Committee will present this award.

PRESIDENT'S AWARD	
The Description:	The Presidential Award is considered to be one of MASFAA's highest awards and is considered to have very high importance. It is given at the discretion of the President and is optional.
The Criteria for Selection:	This award is selected by the President of MASFAA and should be based on an individual's contribution to the Association during the President's term in office. The criteria to be used is based on the President's discretion or initiative, but may in fact be based on the completion of a special task, publication, survey or a host of other criteria.
The Selection:	The recipient is selected by the President and nominations are not solicited. A selection is optional.
The Presentation:	This award is announced and presented at the MASFAA Annual Conference during the Awards Banquet. If the recipient is not in attendance the award shall be forwarded to the recipient. The President usually presents this award.
COMMITTEE OF THE YEAR AWARD	
The Description:	The Committee of the Year Award is a very high award given annually to the members of a committee or task force. The purpose is to recognize those who performed in an outstanding fashion. The award is given to every member of the committee.
The Criteria for Selection:	Consideration for this award shall be given to any MASFAA Committee or Task Force for a special function, conference, project or workshop during the President's term in office. The committee or task force selected for the award should have made a contribution to the betterment of MASFAA in a manner which is unique or truly significant and brings distinction to the group as a result.
The Selection:	The Committee or Task Force of the Year will be selected at the President's discretion.
The Presentation:	This award is announced and presented at the MASFAA Annual Conference during the Awards Banquet. If the recipient is not in attendance, the award shall be forwarded to the recipient. The President usually presents this award.
STUDENT SUCCESS STORY OF THE YEAR AWARD	

The Description:	The Student Success Story of the Year is intended to focus on a specific individual while symbolizing the real purpose of financial aid, which is to provide the means to pursue and realize a post-secondary education. One award per year will be given and the student recipient must be from the state where the MASFAA annual conference is being hosted. It is intended the award be presented on a rotational basis as the conference is rotated. The student's institution receives an identical copy of the award that is given to the student; the student receives the direct recognition while the institution receives indirect recognition.
The Criteria for Selection:	MASFAA is not attempting to select the "most successful" former financial aid recipient, but rather to choose someone who can be representative of all aid recipients who are successful. The nominee for the Student Success Story of the Year must meet the following qualifications:
	<ol style="list-style-type: none"> 1. The nominee must hold a degree or certificate of completion from a post-secondary educational institution within the hosting state, which is an eligible institution for U.S. Department of Education Title IV student assistance programs. 2. The nominee must have received need-based financial assistance while enrolled at the institution. 3. The nominee currently either must be engaged in vocational or professional activity, or be enrolled in a graduate or professional school. Preference will be given to nominees who are not practicing aid administrators. 4. The nominee must be able and willing to attend the awards luncheon. (The Awards Committee will contact nominees.) <p>The Midwestern Association continues to emphasize the student. It is fitting that at its annual meeting MASFAA chooses to honor a student who is a successful financial aid recipient and, in so doing, to honor all students who needed aid, received aid, and used that aid to achieve success.</p>
The Selection:	Nominations for this award will be solicited at the beginning of the calendar year from within the state where the MASFAA Annual Conference is being hosted. A special nomination form with a descriptive letter will be sent to all MASFAA members within that state with the intent of soliciting nominations. The state association will also be asked to perform a separate mailing in order to encourage nominations. The MASFAA Awards Committee will evaluate each nomination and hold discussion on the merits of each potential recipient. The MASFAA Awards Committee shall have the prerogative to request additional information if necessary. The final selection

	will be based on the concept of what the award is intended to represent.
The Presentation:	The Student Success Story of the Year will be announced and presented at the MASFAA Annual Conference during the Awards Banquet. The nominee is expected to be able to attend and receive the award during the banquet. Travel Expenses to the Awards Banquet for the student award recipient will be assumed by MASFAA. A representative from the student's institution will also be asked to attend. Ideally, a representative from the host state will present the award.
YEARS OF SERVICE RECOGNITION	
The Description:	The Forty Year Service Recognition is presented to any active member of MASFAA who has been employed in the financial aid profession for forty (40) years or more. The recognition is automatic, and carries a very high level of importance due to the value placed on longevity in the profession.
The Criteria for Selection:	The Forty Year Service Recognition is presented to any financial aid administrator who has been in the profession for forty (40) years or more. The nominee must be an active member of MASFAA. Nominations are solicited from general membership data. Members are encouraged to self-report themselves.
The Description:	The Thirty-five Year Service Recognition is presented to any active member of MASFAA who has been employed in the financial aid profession for thirty-five (35) years or more. The recognition is automatic, and carries a very high level of importance due to the value placed on longevity in the profession.
The Criteria for Selection:	The Thirty-five Year Service Recognition is presented to any financial aid administrator who has been in the profession for thirty-five (35) years or more. The nominee must be an active member of MASFAA. Nominations are solicited from general membership data. Members are encouraged to self-report themselves.

The Description:	The Thirty Year Service Recognition is presented to any active member of MASFAA who has been employed in the financial aid profession for thirty (30) years or more. The recognition is automatic, and carries a very high level of importance due to the value placed on longevity in the profession.
The Criteria for Selection:	The Thirty Year Service Recognition is presented to any financial aid administrator who has been in the profession for thirty (30) years or more. The nominee must be an active member of MASFAA. Nominations are solicited from general membership data. Members are encouraged to self-report themselves.
The Description:	The Twenty-five Year Service Recognition is presented to any active member of MASFAA who has been employed in the financial aid profession for twenty-five (25) years or more. The recognition is automatic, but carries a level of high importance due to the value placed on longevity in the profession.
The Criteria for Selection:	The Twenty-five Year Service Recognition is presented to any financial aid administrator who has been in the profession for twenty- five (25) years or more. The nominee must be an active member of MASFAA. Nominations are solicited from the general membership and members are encouraged to nominate themselves.
The Description:	The Twenty Year Service Recognition is presented to any active member of MASFAA who has been employed in the financial aid profession for twenty (20) years or more. The recognition is automatic, but carries a level of high importance due to the value placed on longevity in the profession.
The Criteria for Selection:	The Twenty Year Service Recognition is presented to any financial aid administrator who has been in the profession for twenty (20) years or more. The nominee must be an active member of MASFAA. Nominations are solicited from the general membership and members are encouraged to nominate themselves.
The Selection:	The selection of recipients is automatic upon verification by the Awards Committee.
The Presentation:	The presentation of the Service Recognition Awards will take place during the MASFAA Annual Conference. The Awards Committee will present the awards. In the event that the recipient is unable to attend, the award will be forwarded to the recipient.

RECOGNITION OF RETIREMENT	
The Description:	Recognition of Retirement is given to those who retire from the financial aid profession during the current year. The recognition is considered to have a high level of importance.
The Criteria for Selection:	The criteria for this recognition are based on retirement from the financial aid profession due to reasons of health, age or institutional eligibility. The person must have served the most recent fifteen (15) years as a member of a financial aid office or in a position eligible for Institutional or Associate membership in MASFAA. The retirement must also have taken place during the current year and must have taken place by the time of the MASFAA Annual Conference.
The Selection:	The selection is automatic upon verification by the Awards Committee.
The Presentation:	The presentation of the Recognition of Retirement will take place during the MASFAA Annual Conference. The Awards Committee will present the awards. In the event that the recipient is unable to attend, the award will be forwarded to the recipient.
HONORARY MEMBERSHIP AWARD	
The Description:	An award given to a non-MASFAA member who has made important and unique contributions to the financial aid profession and MASFAA's goals.
The Criteria For Selection:	The individual must have demonstrated outstanding and extensive service to MASFAA and the financial aid profession over an extended period of time.
The Selection:	Nominations for this award are made to the MASFAA Executive Council. The nominations must be approved by a majority of Executive Council members after discussion of the merits of the nominee.
The Presentation:	The award is announced and presented at the MASFAA Annual Conference. If the recipient is not in attendance, the award shall be forwarded to the recipient. The President presents this award.
LIFETIME MEMBERSHIP AWARD	
The Description:	An award given to a MASFAA member who has made important and unique contributions to the financial aid profession and

	MASFAA's goals. Lifetime membership entitles the recipient to access MASFAA products (webinars, listserv, annual conference and other events) at the member rate. A lifetime member is entitled to vote only if they are still listed as a participant on an institution's bundle membership.
The Criteria For Selection:	The individual must have demonstrated outstanding and extensive service to MASFAA and the financial aid profession over a sustained period of time. The recipient must hold or have held Institutional or Associate member status and were most recently in good standing per the By-Laws. Lifetime membership is automatically issued to the recipient.
The Selection:	On an annual basis, the President and Award Chair should review the recent retirees for lifetime membership. Nominations for this award are made to MASFAA Association Governance and Planning Committee. The Awards Chair will announce recipients at the Annual Conference.
The Presentation:	The award is announced and presented at the MASFAA Annual Conference. If the recipient is not in attendance, the award shall be forwarded to the recipient. The President presents this award.

7.0 Exhibitor, Donor and Advertising Guidelines

Opportunities for exhibiting, donating and advertising are solicited at the time the Donor Agreement becomes active for the year on the MASFAA Web site. All advertising opportunities and their costs and formats are on that form. Also included will be the name of the individual to receive the advertising data--Electronic Services Committee Chair, conference program booklet company, etc. The Chair of the Associate Member Relations Committee will provide updates to the Electronic Services Committee Chair. These items will be changed by suggestions made to the Executive Council by the Associate Member Relations Committee.

The entity completing the form will receive an invoice via email with instructions about where to send payment. The Associate Member Relations Chair tracks payment for advertising, donations and exhibiting. Funds are forwarded to the Treasurer-Elect with information on how checks are to be credited.

In kind support from corporate donors will be tracked by the Associate Member Relations Chair and included in the donor's total donation amount.

The chair or representative from the Associate Member Relations Committee will serve on the Conference Local Arrangements Committee and relay any vendor issues that may arise.

7.1 Donor Levels and Recognition

- A. *Corporate support levels were discontinued during the 2006-07 year.*
- B. All donations will be listed in the conference program in alphabetical order.
- C. All exhibitors will be listed in the conference program in alphabetical order.
- D. Exhibitors will be recognized throughout the conference and during an Exhibitor Appreciation Reception, which will include the Executive Council.

7.2 Exhibit Space

Booth space will be assigned by the Associate Member Relations Chair, in consultation with the Local Arrangements Committee Chair, on the basis of the receipt date of the Corporate Support Agreement. The Chair will coordinate the booth space with the drayage company for the conference.

7.3 MASFAA Conference Exhibitor Terms and Conditions

- A. MASFAA reserves the right to exercise its sole discretion in the acceptance or refusal of exhibitor applications.
- B. The MASFAA Conference is designed to provide a showcase for products and services either specifically designed for or customarily used in higher education administration. The exhibit hall is provided strictly as a means of information exchange. Exhibitors may not make sales or take orders in the exhibit area or within other MASFAA meeting facilities provided.
- C. No part of an exhibit shall be dismantled nor materials removed until the exhibit area closes on the final day of the conference without specific permission from MASFAA Associate Member Relations Chair. All spaces must be vacated by 7:00 PM the same day. If spaces are not vacated by that time, MASFAA reserves the right to remove materials. MASFAA will not be liable for any damage or loss as a result of such removal.
- D. Booth space is assigned by the Associate Member Relations Chair based first by those who have specifically purchased a package that provides priority booth location, and second, in the order that exhibit booth spaces are reserved. Placement decisions made by the Associate Member Relations Chair are final.
- E. Requests for cancellation of space must be directed in writing to the MASFAA Associate Member Relations Chair via e-mail, fax or mail. All requests for cancellation must be received at least 30 days prior to the start of the conference. Exhibitors canceling less than 30 days prior to the first day of the conference are financially liable for the full fee.
- F. MASFAA and the MASFAA conference facility or any of their officers or staff will not be responsible for the safety or the property of the exhibitor from theft, damage by fire, accident or other causes. Exhibitors are advised to consult their insurance broker for

proper coverage on display material from the time it leaves their premises until its return. MASFAA nor the MASFAA conference facility nor any of their officers, agents, employees or representatives shall be held accountable or liable for, and the same are hereby released from accountability or liability for any damage, loss, harm or injury to the person or any property of the Exhibitor or any of its officers, agents, employees, or other representatives, resulting from theft, fire or other causes. Neither MASFAA nor the MASFAA conference facility will obtain insurance against any such damage, loss, harm or injury.

- G. Exhibitor hereby agrees to indemnify and hold harmless MASFAA and the MASFAA conference facility from any and all claims, demands, suits and liability for any damage, loss, harm or injury to any person or any property of the Exhibitor or any of its officers, agents, employees or other representatives. Exhibitor assumes responsibility and agrees to indemnify, defend and hold harmless MASFAA and the MASFAA conference facility and their respective employees and agents against any claims or expenses arising out of the use of the exhibition premises, including, but not limited to, any cost incurred as a result of alleged violations of copyright arising out of the use of mechanically or electronically reproduced music.
- H. Exhibitors or their agents may not allow any article to be brought into the MASFAA conference facility or any act on the premises that will invalidate the insurance or increase the premiums on the policies held by the MASFAA conference facility nor permit anything to be done by their employees through which act the premises, property or equipment of other exhibitors will be damaged. No sign or articles can be affixed, nailed, or otherwise attached to walls, doors, etc., in such manner as to damage them. All space is rented subject to these restrictions. Exhibitors will be held liable for any damage resulting from such violations.
- I. Extremely loud noises such as bells, sirens, buzzers, etc. will not be permitted in order to maintain a professional atmosphere.
- J. Promotional activity is limited to the confines of space assigned by MASFAA. Exhibitors may not work the aisles, general areas or spaces assigned to others.
- K. Exhibitors may not schedule other events such as breakfasts, luncheons, dinners, receptions, or sessions during official MASFAA program hours or while the exhibit hall is open, unless specific permission is granted by the Associate Member Relations Chair.
- L. In the event that the MASFAA Conference is canceled due to fire, strikes, government regulations, acts of God or other causes beyond their control, MASFAA shall not be held liable for failure to hold the meeting as scheduled. In such events, MASFAA, at its sole discretion, may refund part or all of the amount paid by the Exhibitor to MASFAA. In no event will MASFAA or the MASFAA conference facility be liable for any direct, indirect, actual, special or consequential damages of any nature whatsoever, including, but not limited to, lost profits, business interruptions or other economic loss to the applicant due to cancellation of the MASFAA conference as scheduled.
- M. Exhibitors may not offer conference participants the opportunity to sign up for or enroll in any contests to receive gifts or giveaways at a later time in excess of the stated nominal value.

- N. Exhibitors shall not provide any gift or give-away items of more than nominal value (less than \$10 fair market value).
- O. Any support provided by an Exhibitor or Donor must be channeled through the Associate Member Relations Chair.
- P. The exhibitor agrees that MASFAA shall have the right to make such rules and regulations or changes in arrangements as it deems necessary and to amend them from time to time. MASFAA shall have the final determination and enforcement of all rules, regulations and conditions.

8.0 MASFAA Principles and Practices

- A. The financial aid administrator and other institutional representatives should exercise discretion in using financial aid as a recruitment device.
- B. The financial aid administrator shall provide funds only to supplement the sum of the expected family contribution and other resources except where funds are specifically earmarked for no-need students (scholars, athletes, musicians, etc.).
- C. In addition, the financial aid administrator shall make every effort to encourage all non-institutional sources (private donors, state and federal programs) to award all aid on the basis of need.
- D. The financial aid administrator shall serve the financial needs of all students simply, directly, and in a non-discriminatory manner and shall teach financial responsibility (adopting a reasonable budget, meeting financial obligations, etc.) to all students.
- E. The financial aid administrator shall be sensitive to the total needs of students and shall be aware of the services available within the institution in order to make appropriate referrals.
- F. Institutional financial assistance shall not be used as a disciplinary device. The financial aid administrator should resist any such legislation or conditions attached to other assistance administered by the financial aid office.
- G. The financial aid administrator shall respect the confidentiality of each student's records and shall release information only with the written consent of the student.
- H. When preparing funding requests, the financial aid administrator shall estimate institutional needs honestly and realistically.
- I. The financial aid administrator shall make the student aware of conditions under which an award is granted at the time the offer is made.
- J. Financial aid administrators shall discourage use of the terms "scholarship, grant and gift aid" for any monies which must be repaid if certain specified conditions are not met.
- K. The financial aid administrator shall state clearly and realistically the total cost for attendance and, whenever possible, the expected family and student contribution.

9.0 2020-2023 Strategic Plan

The Strategic Plan of the Midwest Association of Student Financial Aid Administrators is intended to help guide the Association as it makes decisions about resource allocations, training, advocacy, and community support activities. This Plan is built on the guiding principles laid out in the Articles of Incorporation and summarized in the Mission Statement. The Strategic Plan uses these concepts to articulate a set of goals for the Association over the next few years. It is recommended that this plan be reviewed annually and amended as needed to reflect emerging circumstances.

The 2020-2023 MASFAA Strategic Plan may be found at:

<https://masfaaweb.org/resources/Documents/MASFAA%20Strategic%20Plan%202020-2023.pdf>

10.0 Social Media Policy Statement

MASFAA social media accounts shall be used to inform and interact/engage with current and prospective members regarding the financial aid profession and/or networking. This includes specific MASFAA-sponsored program promotions, deadline reminders, professional development tips and answers to common questions about MASFAA and the profession.

As the voice of MASFAA, the social media outlets will be held to high standards with the intent to present a consistent, cohesive, professional image and to respect the rights and the dignity of everyone reached by their messages. The social media accounts for MASFAA shall be administered in accordance with MASFAA policies and procedures and social media best practices. Postings to social media accounts shall be free of offensive, sexually explicit, pornographic, or defamatory material. Postings must be free of strictly commercial content except in the case of advertisement space permitted on the blog. Other types of content shared by other for-profit and nonprofit entities may be appropriate content to share if they meet the needs of the membership and conform to the MASFAA mission and objectives, such as professional development opportunities, scholarship opportunities, etc. Use good judgment to determine the appropriateness of content and rely on colleagues on the Executive Council to assist with content decisions, if necessary.

A. Social Media Guidelines (Like us. Follow us. Tweet at us. Connect with us.)

Before posting any content to any social media outlet or blog affiliated with MASFAA, please take a moment to think carefully and thoughtfully of how it supports our overall mission and objectives.

MASFAA members are encouraged to contribute, connect, and share with MASFAA social media and blog outlets.

B. Interacting with Others

Provide expertise and positive insight about the association to help create a bond and build support and rapport with users, which could include association members, other regional association members, prospective association members, conference attendees, conference speakers or future speakers, other higher education colleagues and researchers, etc. If

commenting, post something meaningful, encouraging, informative, and respectful. Before posting, re-read your post/comment to make sure it can't be misconstrued as negative or inappropriate. If you have any doubt, ask a MASFAA colleague on the Executive Council to review it before you post it. Respond to questions or inquiries in a timely fashion, which requires multiple members to be responsible for checking the accounts regularly. Since timestamps are published with posts, other users will know just how quickly you respond to them with accurate and relevant information. A good guideline for our purposes would be within 24 hours (even if you don't have an answer within that time frame, it is good practice to respond to the inquiry that information is forthcoming). Disagreement should not be squelched. If you respond to a disagreement, do so in a professional and respectful manner. Respect proprietary information, content, and confidentiality.

C. Participation Protocol

Be transparent. If you're discussing a MASFAA-related topic, make sure it is information that can be shared with followers who may not be MASFAA members. Keep in mind that what you say officially represents the university and should be absolutely accurate. Respect privacy (i.e. do not reveal information about a user that the user has not already provided). For instance, a user may be an employee at a specific institution of higher education within the MASFAA region, but may not want his/her institution associated with his/her social media account. In online social networks, the lines between public and private, personal and professional, are blurred. Be sure that content is consistent with MASFAA's role and standards. Make sure that efforts to be transparent do not violate privacy, confidentiality, or legal guidelines. All statements must be true, accurate, and not misleading. Do not put another regional association or NASFAA in a negative light. Instead, focus on positive points of MASFAA and state associations within the MASFAA region. Engaging with and sharing other regional associations and NASFAA content is encouraged for the betterment of the profession and discussion. Do your homework and get help, if needed. MASFAA is teeming with experts. Find them. Engage in conversation. Talk to your users like you would discuss with people in a face to face professional environment. Avoid composed, stilted, and association speak.

Be friendly. Provide quality – interesting, accurate, and up-to-date information.

Be responsible. Lead the discussion – point users in the right direction and provide them with an example of how social- networking sites operate. Show MASFAA pride.

D. Moderation Guidelines

In most social media, organizations are unable to pre-approve public posts to its pages or sites. As such, MASFAA does not pre-approve content. Sites are regularly monitored and content violating policy will be removed. If a user posts a constructive comment that does not violate policy, do not delete it. Instead, engage the user in conversation. Perhaps we can help solve a problem or learn about how MASFAA can better serve its members. Always use facts in supporting statements and, when possible, include links. Correct misinformation. If a user posts a false accusation or an inaccurate statement, don't delete it. Instead, respond – in a respectful and

friendly manner – with accurate information. If a user posts an ignorant and/or offensive remark, you can use the opportunity to help educate the person without being condescending, pointing him or her to reliable resources and correcting false impressions. Where warranted, when removing a post, leave a reminder of the policy so the user will better understand why the post was removed. Contact the individual who posted the deleted item and remind him or her about the policy. Also, thank the user for following and interacting with MASFAA and encourage future appropriate participation. One of the most important things to remember when moderating social media is that these conversations reside on the Internet. Providing a forum gives MASFAA a chance to monitor what is being said, to correct any misconceptions, and to provide accurate information to all users. Removing a discussion does not eliminate the discussion. If you allow it to take place, users will stick around.

E. Comment Policy

MASFAA welcomes comments and hopes that conversations will be polite. Users are responsible for their own content and comments. MASFAA does not discriminate against views, but may delete any of the following: (a) violent, obscene, profane, hateful, or racist comments; (b) comments that threaten or harm the reputation of any person or organization; (c) endorsements, advertisements, or solicitations; (d) comments that suggest or encourage illegal activity; (e) and multiple off-topic posts or repetitive posts that are copied and pasted; (f) personal information, including but not limited to email addresses, telephone numbers, mailing addresses, or identification numbers. In short, be nice and add to the discussion. If a user continually violates this policy, MASFAA may limit a user's ability to comment in the future.

F. Linking Policy

1. Links to government websites

MASFAA may link to publicly available websites that are government-owned or government-sponsored, most commonly offices within the U.S. Department of Education. Acceptable federal government-owned or government-sponsored website domains include .gov, .mil, and .fed.us.

MASFAA may also link to quasi-governmental agencies and websites created by public sector/private sector partnerships; state and local government sites (e.g., www.dhe.mo.gov); and some government-sponsored websites that end in .com, .org, or .net (e.g., www.myedaccount.com).

2. Links to non-government websites

MASFAA may also link to websites that are not government-owned or government-sponsored if these websites provide student aid information and/or services in a way that is not available on official government websites. MASFAA provides these nongovernment websites as a public service only. When users select a link to an external

website, they are leaving the MASFAA site/account and are subjected to the privacy and security policies of the owners/sponsors of the external website.

With regard to linking to other websites, MASFAA (a) does not control or guarantee the accuracy, relevance, timeliness, or completeness of information contained on a linked website; (b) does not endorse the organizations sponsoring linked websites, and does not endorse the views expressed or products offered on those sites; (c) is not responsible for transmissions users receive from linked websites; (d) and does not guarantee that external websites are accessible.

G. Disclaimer of Endorsement

The opinions expressed by users are their own. Any references to institutions, programs, activities, commercial entities, products, and services that appear on MASFAA social media accounts are not intended to reflect the opinion of MASFAA or its officers and are not an official or personal endorsement of any views expressed or product, person, or service, and may not be quoted or reproduced for the purpose of stating or implying that MASFAA approves of any product, person, or service.

H. Sharing Photography/Images

MASFAA will not share protected photography/images (unless they are specifically labeled for reuse or MASFAA has been given explicit permission to share). MASFAA will take photos at its various events and shall ask for verbal consent prior to taking a photo of a member/attendee (who is an adult; written permission shall be obtained from a parent for photos of minors, if applicable). MASFAA will not subject its attendees or members to potentially compromising situations by sharing questionable photos, such as those with members/attendees with beverage containers (in an effort to avoid the presumption that alcohol is being consumed).

I. Blogging and Guest-Blogger Guidelines

Each committee is responsible for submitting written reports for the MASFAA Blog as requested by the MASFAA Blog Editor. All blogs that are editorialized (i.e. opinion articles) must be reviewed and approved by the Executive Council prior to publication. MASFAA reserves the right to edit or trim. Original content is most welcome, but it is acceptable to repurpose content from other sources with reference and permission from the original source (e.g. state association blogs/newsletters).

Trend topics are welcome as well as infographics and whitepapers as long as the blog post is content driven and not pure promotion of a document or service. The blog shall exclude pure promotions in blog content (although, advertisement space may be sold in marginal spaces) and be content-driven as knowledge-sharing and informational. Blog articles should be posted frequently, at least on a bi-weekly basis and should include relevant links. Authors must be thought leaders and financial aid practitioners are most appropriate. Consultants or agencies may post guest articles per the Executive Council approval. Sales and vendor marketing are rarely, if ever, appropriate blog post material. A good guideline for length should be approximately 450-500

words with a maximum of 750 words. Shorter posts that highlight interesting facts or statistics may also be appropriate. Images used on the blog must be owned by the author or in public use). No links to outside images should be used.