SECTION 1:

INTRODUCTION AND HISTORY

1.1 AASFAA MISSION STATEMENT

The mission of AASFAA is to provide our members with the highest quality of personal and professional growth opportunities. We do this by providing ongoing training and access to a broad network of financial aid professionals spanning all types of institutions.

AASFAA members value integrity, honesty, hard work and camaraderie. It is through our participation in AASFAA that we exhibit these characteristics and through our daily interactions that we live them.

1.2 PURPOSE AND SCOPE OF THE AASFAA POLICIES AND PROCEDURES MANUAL

This Policies and Procedures Manual is designed to be a basic guide to the operations and organizational structure of the Arizona Association of Student Financial Aid Administrators (AASFAA). It was assembled to provide general instruction on the features of the Association. This guide is in no way intended to be all-inclusive and can be updated at the discretion of the Board of Directors. This Manual is a living document and as such AASFAA welcomes creative ideas and solutions that may not be outlined in this document.

The first edition of the AASFAA Policies and Procedures Manual was adopted on the ninth day of March 1995. All revisions must be approved by the Board of Directors and recorded in Appendix D.

1.3 HISTORY OF AASFAA

In August 1967, a small group of financial aid professionals met in Flagstaff to discuss the possibility of creating a unified financial aid application to ease the burden of dealing with multiple financial aid forms for financial aid offices and high school counselors. There was much agreement on pursuing this objective and plans were put in motion to produce a High School Counselors Guide. Another outcome was the realization that Arizona could benefit from a permanent organization to meet similar needs and problems.

In August 1968, at another meeting in Flagstaff, the Arizona Association of Financial Aid Officers was established. Joseph E. Bednorz of Northern Arizona University was selected to be the first President. The first Constitution and Bylaws were adopted in March 1969. Also in 1969, AAFAO petitioned the newly formed Western Association of Student Financial Aid Administrators for admission to the organization.

In November 1970, the first Association newsletter was established and was called the AAFAO Bulletin. The editor was Jack Foreman and Hank Kutak and Merle West assisted him.

In 1971-72, Richard Wooten became the first Arizonan to serve as WASFAA President.

The first WASFAA Conference hosted by AAFAO was in 1975, in Phoenix under the leadership of Les Knoll and Merle Lange.

By 1976, the Association had changed its name to the Arizona Association of Student Financial Aid Administrators and had adopted the logo of the outline of the State of Arizona with the Lamp of Knowledge as a centerpiece.

The WASFAA Conference returned to Arizona in 1982 and AASFAA provided another warm western reception, this time under the direction of Vince Roig.

Iris Roach, the first woman to serve as an AASFAA President, in 1982-83 ushered in an era of increased participation by the private trade and technical sector.
The decade of the 1980’s saw AASFAA grow from a small group of dedicated professionals to a large, efficient and effective professional organization. AASFAA continued to provide services and meet the needs that were responsible for its creation. The Association has shown time and time again that it has the talent, expertise and commitment to provide leadership in the field of financial assistance.

In 1991, WASFAA was once more the guest of AASFAA for its annual conference. The leadership of Paul Barberini provided for a successful event.

In 1992, after many years of research and hard work, AASFAA was incorporated due to the diligence and commitment of Dan Lupin.

In July 1992, AASFAA entered its twenty-fifth year of service to the profession. We celebrated the past and looked forward to the future.

In July of 1993, AASFAA was the recipient of a state award from the National Association of Student Financial Aid Administrators. The "NASFAA State Award for Service to Students, Parents or Families", which recognized AASFAA's video, "Cash for College", was disbursed to all high school counselors as well as being telecast on statewide television as an early awareness and outreach campaign. The award recognized the culmination of a three-year effort of Dan Melosi, Diana Mateer, and Dave Briney.

In 1995, AASFAA and the Arizona Commission for Postsecondary Education joined forces to coordinate College Goal Sunday, a statewide program that provides free information and assistance to Arizona students and families applying for college financial aid.

In February 1999, AASFAA went live on the Internet at www.aasfaa.org and in 2000 we continued working towards innovation and change.

In fall 2000, we renamed and awarded the John Medley Financial Aid Advocacy Award to honor our friend and colleague who passed away suddenly in December 1999. The award was presented to John’s family at the fall 2000 AASFAA/NAFAA joint conference in Laughlin, Nevada.

During 2001-2002, the number of conference scholarships was increased to members and updates to our bylaws were approved by the membership.

In November of 2002, AASFAA President, Pat Peppin created an Ad Hoc committee to automate the Tribal Funding Application Process. The project created a common electronic FNA application (Tribal funding application) that all Arizona tribes, schools and students could utilize. The tribal funding application process had traditionally been a very labor intensive and paper intensive process for students, schools, and tribes in Arizona. In 2006, AASFAA was recognized by NASFAA as the winner for service to other constituencies for the Automation of the Tribal Funding Application Process.

In March 2018, we went to our membership to collect options for a new logo for AASFAA. We received a few submissions and we presented the current logo along with the three proposed logos to see if the membership wanted to change the logo. A large majority of the membership voted for one of the new logos that was submitted by Nicholas Dehaan from University of Phoenix. AASFAA adopted this new logo effective immediately and began the process of updating our logo on all our materials. Here is an example of the old logo and the new logo:
### 1.4 AASFAA FORMER PRESIDENTS

AASFAA has grown and matured through the efforts of its leadership and hard work of its membership. To those leaders, we say thank you and wish to recognize them in this manual.

<table>
<thead>
<tr>
<th>YEAR</th>
<th>NAME</th>
<th>INSTITUTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>1968-69</td>
<td>Joseph Bednorz</td>
<td>Northern Arizona University</td>
</tr>
<tr>
<td>1969-70</td>
<td>Jim Sarrels</td>
<td>The University of Arizona</td>
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<td>1970-71</td>
<td>Van L. Bushnell</td>
<td>Arizona State University</td>
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<tr>
<td>1971-72</td>
<td>Merle Lange</td>
<td>Glendale Community College</td>
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<td>1972-73</td>
<td>Robert Thompson</td>
<td>Central Arizona College</td>
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<td>1973-74</td>
<td>J. J. Humphrey</td>
<td>The University of Arizona</td>
</tr>
<tr>
<td>1974-75</td>
<td>Hank Kutak</td>
<td>Maricopa Technical College</td>
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<tr>
<td>1975-76</td>
<td>Alan Shipley</td>
<td>Northern Arizona University</td>
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<tr>
<td>1976-77</td>
<td>Richard Michaud</td>
<td>Arizona State University</td>
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<tr>
<td>1977-78</td>
<td>Les Knoll</td>
<td>Mesa Community College</td>
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<tr>
<td>1978-79</td>
<td>Dennis Hegle</td>
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<td>1979-80</td>
<td>Joe Peniska</td>
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<td>1980-81</td>
<td>Vince Roig</td>
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<td>1981-82</td>
<td>Moises Hernandez</td>
<td>Mesa Community College</td>
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<tr>
<td>1982-83</td>
<td>Iris Roach</td>
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<td>1983-84</td>
<td>Pat Clark</td>
<td>Arizona State University</td>
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<td>1984-85</td>
<td>Michael Dougherty</td>
<td>Yavapai College</td>
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<td>1985-86</td>
<td>Dan Messersmith</td>
<td>Mohave Community College</td>
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<tr>
<td>1986-87</td>
<td>Judy Belanger</td>
<td>Arizona State University</td>
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<tr>
<td>1987-88</td>
<td>Lorrie Rogers</td>
<td>CAD Institute</td>
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<tr>
<td>1988-89</td>
<td>Gene Berg</td>
<td>Arizona State University</td>
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<td>1989-90</td>
<td>Dan Lupin</td>
<td>Embry-Riddle Aeronautical University</td>
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<tr>
<td>1990-91</td>
<td>Roxie LaFever</td>
<td>University of Phoenix</td>
</tr>
<tr>
<td>1991-92</td>
<td>Genevieve Watson</td>
<td>The University of Arizona</td>
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<tr>
<td>1992-93</td>
<td>Diana Mateer</td>
<td>High-Tech Institute</td>
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<td>1993</td>
<td>Ray Ceo</td>
<td>Prescott College</td>
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<td>1993-94</td>
<td>Ted Malone</td>
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<td>1994-95</td>
<td>Ray Ceo</td>
<td>Prescott College</td>
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<td>1995-96</td>
<td>Cathy King-Todd</td>
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<td>1996-97</td>
<td>Gerry Reynolds</td>
<td>South Mountain Community College</td>
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<td>1997-98</td>
<td>June Merrill</td>
<td>American Institute</td>
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<td>1998-99</td>
<td>Sherryl Gibson</td>
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<td>1999-2000</td>
<td>Howard Fischer</td>
<td>Ottawa University</td>
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<td>2000-2001</td>
<td>Phil Schroeder</td>
<td>Cochise College</td>
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<td>2001-2002</td>
<td>Kim Naig</td>
<td>Arizona State University</td>
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<td>2002-2003</td>
<td>Pat Peppin</td>
<td>Mesa Community College</td>
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<tr>
<td>2003-2004</td>
<td>Brad Honious</td>
<td>Gateway Community College</td>
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<td>2004-2005</td>
<td>Paula Cady</td>
<td>The Art Institute of Phoenix</td>
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<tr>
<td>2004-2005</td>
<td>Terri Eckel</td>
<td>Northern Arizona University</td>
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<tr>
<td>2005-2006</td>
<td>Pat Peppin</td>
<td>Mesa Community College</td>
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<td>2006-2007</td>
<td>Terri Eckel</td>
<td>Prescott College</td>
</tr>
<tr>
<td>2007-2008</td>
<td>Ellen Neel</td>
<td>Glendale Community College</td>
</tr>
<tr>
<td>2008-2009</td>
<td>John Nametz</td>
<td>The University of Arizona</td>
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<td>2009-2010</td>
<td>Howard Fischer</td>
<td>Ottawa University</td>
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<td>2010-2011</td>
<td>Craig Fennell</td>
<td>Arizona State University</td>
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<td>2011-2012</td>
<td>Paula Cady</td>
<td>Northcentral University</td>
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<td>2012-2013</td>
<td>Shirley Vaden</td>
<td>Embry-Riddle</td>
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<td>2013-2014</td>
<td>Ed Wagner</td>
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<td>2014-2015</td>
<td>Diana Mateer</td>
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<td>2015-2016</td>
<td>Phil LeBlanc</td>
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<td>2016-2017</td>
<td>Mary Frances Causey</td>
<td>Prescott College</td>
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<tr>
<td>2017-2018</td>
<td>Diana Dowling</td>
<td>Yavapai College</td>
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</table>
Resigned in January 1975 and Alan Shipley assumed the presidency in February, serving a seventeen (17)-month term.

2 Resigned in June 1993 and Ray Ceo assumed the presidency in June, serving a one (1)-month term.

3 Resigned in May 1998 and Lupita Murphy assumed the presidency in May, serving a two (2)-month term.

4 Resigned in October 2004 and Terri Eckel assumed the presidency in November 2004.

5 Resigned in August 2010 and Erin Wilborn assumed the presidency in August, serving an eleven (11)-month term.

6 Resigned in December 2014 and Phil LeBlanc assumed the presidency in January 2015, serving a six (6)-month term.

1.5 ROBERT THOMPSON MEMORIAL LEADERSHIP AWARD

The Robert Thompson Memorial Leadership Award was established by AASFAA in 1985 to honor our friend, colleague and mentor who passed away on January 18, 1985. This award is given annually to a member who has best demonstrated the leadership qualities that typify the standards set down by Bob during his career.

<table>
<thead>
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<th>INSTITUTION</th>
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<td>Judy Belanger</td>
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<td>1990-91</td>
<td>Alan Shipley</td>
<td>A1 Collings Graphic Design School</td>
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<td>1991-92</td>
<td>Vince Roig</td>
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<td>1995-96</td>
<td>Onita Clark</td>
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<td>EdFund</td>
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<td>Southwest Student Services Corporation</td>
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<td>Dan Melosi</td>
<td>Educaid/Wachovia</td>
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<td>2002-2003</td>
<td>Moe Hernandez</td>
<td>Mesa Community College/Retired</td>
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<td>2005-2006</td>
<td>Kim Naig</td>
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<td>Jean Russell</td>
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<td>Douglas Bullock</td>
<td>Chandler-Gilbert Community College</td>
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<td>Pat Peppin</td>
<td>Mesa Community College</td>
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</table>
1.6 HONORARY LIFETIME MEMBERS

AASFAA recognizes individuals who have made an outstanding contribution to the Association or in the area of student financial aid. Honorary Members are voted such membership by the AASFAA Board of Directors. Honorary Membership includes all Association privileges except dues, holding office and voting. The following individuals have been voted in as Honorary Lifetime members:

Ms. Judie Crummel  
Ms. Patricia Stewart Harris  
Mr. Dennis Hegle - Deceased  
Dr. Merle Lange  
Ms. Lorrie Rogers - Deceased  
Mr. Alan Shipley  
Mr. Moe Hernandez  
Mr. Dan Messersmith  
Mr. Ray Steiner  
Ms. Lupita Murphy  
Ms. Rhonda Neale  
Mr. Gene Berg  
Ms. Pat Peppin  
Ms. Terri Eckel  
Ms. Shirley Vaden  
Mr. Dan Lupin  
Mr. Dan Melosi

1.7 JOHN MEDLEY FINANCIAL AID ADVOCACY AWARD

The John Medley Financial Aid Advocacy Award was first established by AASFAA in 1991-1992 as the Member of the Year Award. In 1995-1996 the name changed to Financial Aid Advocacy Award and then again renamed in 1999-2000 after John Medley to honor our friend, colleague, and mentor who passed away suddenly in December 1999. This award may be given annually to a member who has best demonstrated student advocacy and works to provide students with opportunities for education through the FA process and retains qualities that typify the standards set down by John during his career.

<table>
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<tr>
<th>YEAR</th>
<th>NAME</th>
<th>INSTITUTION</th>
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<td>1991-92</td>
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<td>1992-93</td>
<td>David Briney</td>
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<td>1994-95</td>
<td>Margaret Gumble</td>
<td>The University of Arizona</td>
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<td>1995-97</td>
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<td>ASAP/Union Bank &amp; Trust</td>
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<td>1998-99</td>
<td>Jean M. Russell</td>
<td>Southwest Student Services Corp.</td>
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<td>1999-2000</td>
<td>John Medley</td>
<td>Awarded posthumously</td>
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<td>2000-01</td>
<td>Pat Chaplin</td>
<td>Bank of America</td>
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<td>John Nametz</td>
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<td>2002-03</td>
<td>Jane Smith Hersh</td>
<td>Yavapai Community College</td>
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<td>2004-05</td>
<td>Jana Narcia</td>
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<td>Mirna Lord</td>
<td>Northern Arizona University</td>
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<tr>
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<td>Chandler Gilbert Community College</td>
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</table>
SECTION 2: ORGANIZATIONAL STRUCTURE

2.1 ARTICLES OF INCORPORATION

Article I

Name of Corporation. The name of this corporation is and shall be the ARIZONA ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS, INC.

Article II

Principal Place of Business. The known place of business of this corporation shall initially be the same as the office of its statutory agent, until changed, but it may establish other principal places of business and other officers at such other places, either within or without the State of Arizona, as the Board of Directors may from time to time determine.

Article III

Purposes. This corporation is organized and shall be operated as a nonprofit corporation solely and exclusively for charitable, educational and scientific purposes, and specifically for educational purposes, within the meaning of 501 of the Internal Revenue Code of 1986 as amended from time to time. Without limiting the generality of the foregoing or the character of the affairs to be conducted by the corporation in the future, the corporation initially shall conduct the following business:

1. To promote the professional preparation, effectiveness, recognition and association of student financial aid administrators and counselors in postsecondary educational institutions and others in public and private agencies concerned with the support and administration of student financial assistance;
2. To serve effectively the interests and needs of students, educational institutions, and public and private agencies, organizations, and individuals through the coordination of plans and programs pertinent to student financial aid;
3. To facilitate communication among student financial aid administrators, educational institutions, public and private agencies, organizations and individuals concerned with student financial aid administrators;
4. To assist educational institutions and public and private agencies, organizations and individuals to promote and develop effective programs of student financial aid; and
5. To stimulate, promote and conduct research, cooperative studies, conference, and workshops and other related activities as may be desirable or required to fulfill the purposes of the Association.
Consistent with the foregoing purposes and subject to all other limitations, restrictions and prohibitions set forth in these Articles, this corporation shall have all the powers specified in Section 10-1005 (A) of the Arizona Revised Statutes, as amended from time to time, and to do all and everything necessary, suitable and proper for the accomplishment of the purposes or attainment of the objects herein above set forth either alone or in association with other individuals, corporations or sponsorships including federal, state, county, and municipal bodies and authorities; and, in general, to do and perform such acts and transact such business in connection with the foregoing objects not inconsistent with law; provided, however, that the corporation shall not perform any act or transact any business that will jeopardize the tax exempt status of the corporation under Section 501 (c) (3) of the Internal Revenue Code and its regulations as such Section and regulations now exist or may hereafter be amended or under corresponding laws and regulations hereafter adopted.

Article IV

Limitation on Activities. No substantial part of the activities of the corporation shall be carrying on propaganda or otherwise attempting to influence legislation in the State of Arizona; nor shall the corporation participate in or intervene in (including the publishing or distributing of statements) any political campaign on behalf of or in opposition to any candidate for public office.

Article V

Additional Restrictions. The corporation shall be operated in a manner that prevents it from being a private foundation within the meaning of Section 509 of the Internal Revenue Code and its regulations as such Section and regulations now exist or may hereafter be amended or under corresponding laws and regulations hereafter adopted; provided, however, that in the event the objects, purposes and business of the corporation cannot be accomplished unless the corporation is operated as a private foundation, it shall not be operated in violation of the following limitations, restrictions and prohibitions:

(a) The corporation shall distribute its income for each taxable year at such time and in such manner as not to become subject to the tax on undistributed income imposed by Section 4942 of the Internal Revenue Code of 1986 and its regulations as such Section and regulations now exist or may hereafter be amended, or under corresponding laws and regulations hereafter adopted;

(b) The corporation shall not engage in any act of self-dealings as defined in Section 4941 (d) of the Internal Revenue Service Code of 1986 and its regulations as such Section and regulations now exist or may hereafter be amended, or under corresponding laws and regulations hereafter adopted;

(c) The corporation shall not retain any excess business holdings as defined in Section 4943 (c) of the Internal Revenue Service Code of 1986 and its regulations as such Section and regulations now exist or may hereafter be amended, or under corresponding laws and regulations hereafter adopted;

(d) The corporation shall not make any investments in such manner as to subject it to tax under Section 4944 of the Internal Revenue Code of 1986 and its regulations as such section and regulations now exist or may hereafter be amended, or under corresponding laws and regulations hereafter adopted; and

(e) The corporation shall not make any taxable expenditure as defined in Section 4945 (d) of the Internal Revenue Service Code of 1986 and its regulations as such Section and regulations now exist or may hereafter be amended, or under corresponding laws and regulations hereafter adopted.
Article VI

Term. The time for commencement of this corporation shall be the date of the filing of these Articles of Incorporation as required by law, and the term of its corporate existence shall be perpetual.

Article VII

Distributions. This corporation shall be a nonprofit corporation and shall have no stock, and no dividends or pecuniary profits shall be declared or paid to the directors hereof or to any other private individual. All the earnings and property of the corporations shall be used to further the purposes and objects of the corporation as set forth in Article III. Nothing contained herein, however, shall prohibit payments by the corporation to directors or member as reasonable compensation for services rendered to the corporation.

Article VIII

Limitations of Liability. The directors, officers, and members of the corporation shall not be individually liable for the corporation's debts or other liabilities. The private property of such individual shall be exempt from any corporate debts of liabilities. A director of the corporation shall not be personally liable to the corporation or its members, if any, for monetary damages for breach of fiduciary duty as a director, except for liability (i) for any breach of the director's duty of loyalty to the corporation or its members, if any, (ii) for acts of omissions not in good faith or which involve intentional misconduct or a knowing violation of law, (iii) under Section 10-1026 or Section 10-1097 of the Arizona Revised Statutes, or (iv) for any transaction from which the director derived any improper personal benefit. If the Arizona Revised Statutes are hereafter amended to authorize corporate action further eliminating or limiting the personal liability of directors, the liability of a director of the corporation shall be eliminated or limited to the fullest extent permitted by the Arizona Revised Statutes, as so amended. Any repeal or modification of this Article shall not adversely affect any right or protection of a director of the corporation existing at the time of such repeal or modification.

Article IX

Board of Directors. The control and management of the affairs of the corporation shall be vested in a Board of Directors of not less than three (3), nor more than nine (9), persons. The Bylaws of the corporation shall prescribe the terms of office and manner of election of directors.

Article X

Membership. The Board of Directors shall have the power to provide in the Bylaws of the corporation that the corporation shall or shall not have a membership. If a membership is provided for, the qualifications of the members, their manner of selection, and classes of membership, and the rights, duties and voting privileges of members shall be established in the Bylaws of the corporation.

Article XI

Dissolution. No person shall possess any property rights in or to the property or assets of the corporation. Upon dissolution of this corporation as provided in the Bylaws, all assets remaining after payment of any outstanding liabilities shall be distributed exclusively to charitable, religious, educational or scientific organizations which would then qualify under the provisions of Section 501 (c) (3) of the Internal Revenue Service Code and its regulations as such section and regulations now exist or may hereafter be amended, or under corresponding laws and regulations hereafter adopted and which organizations have purposes and objects similar to those of the corporation, all determined in accordance with the Bylaws.

Article XII

Amendments. These Articles of Incorporation may be amended as provided in the Bylaws of the corporation.
Article XIII

Statutory Agent. This corporation hereby appoints CT Corporations Systems, 3225 N. Central Avenue, Phoenix, AZ, as its initial statutory agent. All notices and processes, including service of summons, may be served upon said statutory agent and, when so served, shall be lawful, personal service upon this corporation. The Board of Directors may, at any time, appoint another agent for such purpose, and filing of such other appointment shall revoke this or any other previous appointment of such agent.

2.2 BYLAWS

Article I - Offices

Section 1 - Principal Offices. The principal office of the corporation in the State of Arizona shall be located at the University of Arizona, PO Box 210066, Tucson, AZ 85721-0066, in the County of Pima.

Section 2 - Other Offices. The corporation may maintain other offices, whether within or without the State of Arizona, as determined by the Board of Directors, where all business of the corporation may be transacted.

Section 2 - Known Place of Business. The known place of business of the corporation, as required by A.R.S. Section 10-1008, to be maintained in the State of Arizona, may be, but need not be, identical with the principal office in the State of Arizona. The address of the known place of business may change from time to time by the Board of Directors.

Article II - MEMBERS

Section 1 - Classes of Members. The corporation shall have four classes of Members. The designation of such classes and the qualifications and rights of the Members of such classes shall be as follows:

A. Institutional Membership.
   Shall be limited to postsecondary higher education institutions. People representing and voting for the member institutions shall be financial aid, or other personnel who are responsible for duties in the direct administration of financial aid, including title IV, state aid, institutional aid and scholarships, to students at institutions of post-secondary education. Each member institution shall be entitled to one vote on all matters brought before the Association. Examples of institutional membership may include financial aid, admissions, enrollment management, registrar and business office employees. Individuals representing this class of member may hold any Board position.

B. Associate Membership.
   Shall be available to non-postsecondary organizations whose purpose relates to the administration of Financial Aid and is consistent with the mission and purpose of the Association. People representing the associate members shall be entitled to attend all activities, have a voice in meetings and sit on committees and may vote as a member of the Association. Each associate membership shall be entitled to one vote on all matters brought before the Association. The Board of Directors shall have within its discretion to regulate Associate Membership. Examples of associate membership may include employees of banks, lenders, educational services vendors, financial aid consultants and employees of secondary schools and state agencies. Individuals representing this class of member may hold any Board positions except for President-Elect and President.

C. Individual Membership.
Shall be available to individuals not meeting the definition of Active Membership or Associate Membership whose purpose relates to the administration of Financial Aid and is consistent with the mission and purpose of the Association. Individual Members shall be entitled to attend all activities, have a voice in meetings and sit on committees, but may not vote as a Member of the Association, unless they hold a voting position on the Board of Directors. The Board of Directors shall have within its discretion to regulate Individual Membership. Examples of individual membership may include accountants, lawyers, consultants and other individuals whose profession is related in some way to financial aid. *Individuals* representing this class of member may hold any Board position except for President-Elect and President.

D. **Honorary Membership.**

Shall include individuals who have made an outstanding contribution to the Association or in the area of student financial aid and who are voted such by the Association. Honorary Membership includes all Association privileges except dues, holding office and voting.

**Section 2 - Application.** Application for Membership in the Association shall be made to the Treasurer for processing.

**Section 3 - Termination of Membership.** The Board of Directors, by affirmative vote of two-thirds of all the members of the Board, may suspend or expel a Member for cause after an appropriate hearing, and may, by a majority vote of those present at any regularly constituted meeting, terminate the membership of any Member who becomes ineligible for membership, or suspend or expel any Member who shall be in default in payment of dues for the period fixed in Article XI of these Bylaws.

**Section 4 - Resignation.** Any Member may resign by filing a written resignation with the Secretary, but such resignation shall not relieve the Member so resigning of the obligation to pay any dues, assessments or other charges theretofore accrued and unpaid.

**Section 5 - Reinstatement.** Upon written request signed by a former member and filed with the Secretary, the Board of Directors may, by affirmative vote of two-thirds of the members of the Board, reinstate such former member to membership upon such terms, as the Board of Directors may deem appropriate.

**Section 6 - Transfer of Membership.** Corporation membership is not transferable or assignable.

**Section 7 - Membership Year.** The Membership year shall be from July 1 to June 30 with dues being due and payable to the Treasurer August 1.

**Article III - MEETINGS OF MEMBERS**

**Section 1 - Annual Meeting.** An annual meeting of the Members shall be held in each year, beginning with the year 1992 at a time and place designated pursuant to the terms of these Bylaws for the transaction of such business as may come before the meeting. If the day fixed for the annual meeting shall be a legal holiday in the State of Arizona, such meeting shall be held on the next succeeding business day.

**Section 2 - Special Meetings.** Special meetings of the Members may be called by the President, the Board of Directors, or not less than one-tenth of the Members having voting rights.

**Section 3 - Place of Meeting.** The Board of Directors may designate any place, either in person or electronically, either within or without the State of Arizona, as the place for meeting for any meeting or for any special meeting called by the Board of Directors. If no designation is made or if a special meeting be otherwise called, the place of meeting shall be the principal office of the corporation in the State of Arizona; but if all of the Members shall meet at any time and place either within or without the State of Arizona, and consent to a holding of a meeting, such meeting shall be valid without call or notice, and at such meeting any corporate action may be taken.
Section 4 - Notice of Meetings. Unless waived, written notice stating the place, day and hour of any meeting of the Members shall be delivered, either personally, by electronic means, or by mail, to each Member entitled to vote at such meeting, not less than ten nor more than ninety days before the date of such meeting, by or at the direction of the President, or the Secretary, or the officers or persons calling the meeting. In case of a special meeting or when required by statute or by these Bylaws, the purpose or purposes for which the meeting is called shall be stated in the notice. If mailed, the notice of a meeting shall be deemed delivered when deposited in the United States and addressed to the Member at his/her address as it appears on the records of the corporation, with postage thereon pre-paid.

When a meeting is adjourned to another time or place, notice need not be given of the adjourned meeting if the time and place thereof are announced at the meeting at which the adjournment is taken. At the adjourned meeting the corporation may transact any business, which might have been transacted at the original meeting. If the adjournment is for more than thirty days or if after the adjournment a new record date is fixed for the adjourned meeting, a notice of the adjourned meeting shall be given to each Member entitled to vote at the meeting.

Section 5 - Fixing Date for Determination of Voting Members. In order that the corporation may determine the Members entitled to notice of or to vote at any meeting of Members or any adjournment thereof, or entitle to express consent or corporate action in writing without a meeting, the Board of Directors of the corporation may fix, in advance, a record date, which shall not be more than fifty (50) nor less than ten (10) days before the date of such meeting, nor more than fifty (50) days nor less than ten (10) days prior to any other action.

A determination of the Members entitled to notice of or to vote at a meeting of Members shall apply to an adjournment of the meeting; provided, however, that the Board of Directors may fix a new record date for the adjourned meeting and further provided that the adjournment or adjournments do not exceed thirty (30) days in aggregate.

Section 6 - Voting Record. The officer or agent having charge of the books of the corporation shall make a complete record of the Members entitled to vote at each meeting of Members of any adjournment thereof, arranged in alphabetical order, with the address of each. Such record shall be produced and kept open at the time and place of the meeting and shall be subject to the inspection of any Member during the whole time of the meeting for the purpose thereof.

Section 7 - Action by Members without a Meeting. Any action required or permitted to be taken at a meeting of the voting Members may be taken without a meeting if a consent in writing, setting forth the action so taken, is signed by a majority of the Members entitled to vote with respect to the subject matter thereof. Such consent shall have the same effect as the unanimous vote of the voting Members.

Section 8 - Quorum. The Members holding one-tenth (1/10) of the votes which may be cast at any meeting shall constitute a quorum of such meeting. If a quorum is not present at any meeting of members, a majority of the members present adjourn the meeting from time to time without further notice.

Section 9 - Proxies. At any meeting of members, a member entitled to vote may vote by proxy executed in writing by the member or by his/her duly authorized attorney-in-fact. No proxy shall be valid after eleven months from the date of its execution, unless otherwise provided in the proxy.

Section 10 - Manner of Acting. A majority of the votes entitled to be cast on a matter to be voted upon by the members present or represented by proxy at a meeting at which a quorum is present shall be necessary for the adoption thereof unless a greater proportion is required by law or these by-laws.

Section 11 - Voting by Mail. Where Directors or officers are to be elected by members or any class or classes of members, such election may be conducted by mail in such manner as the Board of Directors shall determine. Any other action required to be taken by members, or any class or classes of members, may be conducted by mail.
Article IV - BOARD OF DIRECTORS

Section 1 - Powers of Director. The business and affairs of the corporation shall be managed by its Board of Directors.

Section 2 - Number, Tenure and Qualifications. The number of Directors shall be limited to 9. The Board of Directors shall be comprised of the incumbent officers and immediate Past President of the corporation. Each Director shall hold office until the end of the current membership year unless otherwise specified in Article V of these Bylaws. Each Directorship shall also be subject to those limitations set forth in Article V of these Bylaws as they relate to the specific and corresponding office of the corporation held by each Director.

Section 3 - Regular Meetings. A regular annual meeting of the Board of Directors shall be held without other notice than these bylaws, at the same place as the annual meeting of Members. The Board of Directors may provide by resolution the time and place, either within or without the State of Arizona, for the holding of additional regular meetings of the Board without other notice than such resolution.

Section 4 - Special Meetings. Special meetings of the Board of Directors may be called by or at the request of the President or any two Directors. The person or persons authorized to call special meetings of the Board may fix any place, either in person or electronically, either within or without the State of Arizona, as the place for holding any special meeting of the Board called by them.

Section 5 - Notice. Notice of any special meeting of the Board of Directors shall be given at least two days previously thereto by written notice delivered personally or sent by mail or telegram to each Director or his address as shown by the records of the corporation. If mailed, such notice shall be deemed to be delivered when deposited in the United States mail in a sealed envelope so addressed, with postage thereon prepaid. If notice is given by telegram, such notice shall be deemed to be delivered when the telegram is delivered to the telegraph company. Any Director may waive notice of any meeting. The attendance of a Director at any meeting shall constitute a waiver of notice of such meeting, except where a Director attends a meeting for the express purpose of objecting to the transaction of any business because the meeting is not lawfully called or convened. Neither the business to be transacted at, nor the purpose of, any regular or special meeting of the Board need be specified in the notice or waiver of notice of such meeting, unless specifically required by law or by these Bylaws.

Section 6 - Quorum. A majority of the number of Directors then serving shall constitute a quorum for the transaction of business at any meeting of the Board of Directors; but if less than such majority are present at a meeting, a majority of the Directors present may adjourn the meeting from time to time without further notice.

Section 7 - Manner of Action. The act of a majority of the Directors present at a meeting at which a quorum is present shall be the act of the Board of Directors, unless the act of a greater number is required by law or by these Bylaws.

Section 8 - Vacancies. Any vacancy occurring in the Board of Directors and any Directorship to be filled by reason of an increase in the number of Directors may be filled by the affirmative vote of a majority of the remaining Directors, though less than a quorum of the Board of Directors, consistent with the provision of these Bylaws as otherwise set forth below. A Director elected to fill a vacancy shall be elected for the unexpired term of his predecessor in office.

Section 9 - Removal. At a meeting of Members called expressly for that purpose and by a vote of a majority of the Members then entitled to vote at an election of the Directors, any Director or the entire Board of Directors may be removed, with or without cause.

Section 10 - Informal Action by Directors. Any action required by law to be taken at a meeting of Directors, or any action which may be taken at a meeting of Directors, may be taken without a meeting if a
consent in writing, setting forth the action so taken, shall be signed by all of the Directors. Such consent shall have the same effect as a unanimous vote.

Section 11 - Presumption of Assent. A Director of the corporation who is present at a meeting of the Board of Directors at which action on any corporate manner is taken shall be presumed to have assented to the action unless his dissent shall be entered in the minutes of the meeting or unless he/she shall file his written dissent to such action with the Secretary of the meeting before the adjournment thereof or shall forward such dissent by registered or certified mail to the Secretary of the corporation before 5:00 of the afternoon of the next day which is not a holiday or a Saturday after the adjournment of the meeting. Such right to dissent shall not apply to a Director who voted in favor of such action.

Section 12 - Compensation. Directors as such shall not receive any stated salaries for their services, but by resolution of the Board of Directors a fixed sum and expenses of attendance, if any, may be allowed for attendance at each regular or special meeting of the Board; but nothing herein contained shall be construed to preclude any Director from serving the corporation in any other capacity and receiving compensation therefore.

Article V - OFFICERS

Section 1 - Officers. The officers of the corporation shall be a Past President, President-Elect, President, one or more Vice Presidents (the number thereof to be determined by the Board of Directors), Secretary, Treasurer and Treasurer-Elect. With the exception of the President-Elect and President, all officers must be employed as financial aid administrators at a school providing postsecondary education or representatives of other educational institutions, private or public agencies, organizations and individuals in Arizona concerned with/or engaged in the support and/or administration of student financial aid. The Board of Directors may elect or appoint such other officers, including one or more Assistant Secretaries and one or more Assistant Treasurers, as it shall deem desirable, such officers to have the authority and perform the duties prescribed, from time to time by the Board of Directors.

A. Should the aforementioned officers not fully represent the recognized postsecondary education segments in Arizona (public four-year, public two-year, private and proprietary, or the no-postsecondary institutional agencies, organizations, and individuals in Arizona concerned with/or engaged in the support and/or administration of student financial aid), the Board of Directors shall either appoint or authorize a special ballot to the Members for the purposes of electing Representatives-at-Large with officer authority and with full voting privileges, to represent the under-represented postsecondary segment(s).

Section 2 - Election and Term of Office. The officers of the corporation shall be elected annually by the voting membership. An election of officers shall be held each year no later than April 15 under the supervision of a Nomination and Elections Committee appointed by the Board of Directors. If the election of Directors shall not be held on the day designated herein for any annual meeting, or at any adjournment thereof, the Board of Directors shall cause the election to be held at a special meeting of the Members as soon thereafter as conveniently may be, provided however that said election may be conducted by mail pursuant to Section 11 below.

Each officer shall hold office until the end of his specified term, unless restrictions set forth in Section 4 of this Article apply, and until his successor shall have been duly elected and shall have qualified. All officers shall hold office for a term not to exceed one membership year as defined in Article II Section 7. Notwithstanding any provision to the contrary, the Board, at its earliest convenience, shall replace any officer whom, during the term of his/her office, ceases to be employed in a qualified sector of AASFAA, by regular or special meeting and in accordance with further restrictions set forth in Section 4 of this Article.

Section 3 - Removal. Any officer or agent may be removed by the Board of Directors whenever in its judgment the best interest of the corporation will be served thereby, but such removal shall be without
prejudice to the contract rights, if any, of the officer or agent so removed. Election or appointment of an officer or agent shall not of itself create contract rights.

Section 4 - Vacancies. A vacancy in any office because of death, resignation, removal or disqualification, or any other reason, may be filled by the Board of Directors for the unexpired portion of the term; with the exception of the office of President-Elect and Treasurer-Elect, which must be filled by an officer elected through a special election by the voting membership. In addition, a vacancy in the office of President shall be filled in accordance with the procedure set forth in Section 8 of this Article. Furthermore, in absence of the Past-President, the Board of Directors may appoint any person who has previously held the position of Past-President in a prior membership year.

Section 5 - President-Elect. The President-Elect shall observe the duties performed by the incumbent President and normal business transacted by the Board in preparation for his/her coming term as President and such other duties as may be prescribed by the Board of Directors from time to time. The President-Elect shall automatically assume the office of President during the subsequent membership year. They will serve on the Policies and Procedures Task Force.

Section 6 - President. The President shall be the principal executive officer of the corporation and, shall in general supervise and control all of the business and affairs of the corporation. He/She may sign, with the Secretary or any other proper officer of the corporation duly authorized by the Board of Directors, certificates of membership, deeds, mortgages, bonds, contracts, instruments of conveyance, checks, drafts, notes and other instruments which the Board of Directors has authorized to be executed, except in cases where the signing and execution thereof shall be otherwise expressly delegated by the Board of Directors, these Bylaws or law to some other officer or agent of the corporation. The President, in general, shall perform all duties incident to the office of President and such other duties as may be prescribed by the Board of Directors from time to time. The President shall automatically assume the office of Past-President upon successfully completing his/her term during the following membership year.

Section 7 – Past-President. The Past-President is an individual who successfully completed his/her term as President in a prior membership year. The Past-President shall advise the President on parliamentary procedures, articles of incorporation, bylaws, and other such duties as assigned by the President or Board of Directors from time to time.

Section 8 - Vice President. In absence of the President or in the event of his/her inability or refusal to act, the Vice President (or in the event there be more than one Vice President, the Vice-Presidents in the order designated at the time of their election, or in the absence of any designation, then in the order of their election) shall perform the duties and exercise the powers of the President until the President-Elect assumes the office of President at the beginning of the subsequent membership year. Any Vice President shall have such powers and perform such duties as may be delegated to him/her by the Board of Directors. The Vice President must be from a postsecondary institution to comply with additional duties that may occur if the President steps down. The Vice President shall bring to each meeting a copy of the updated copy of the By-laws and serve on the Policies and Procedures Task Force.

Section 9 - Treasurer. If required by the Board of Directors, the Treasurer shall give a bond for the faithful discharge of his/her duties in such sum and with such surety or sureties, as the Board of Directors shall determine. He/She shall have charge and custody of and be responsible for all funds and securities of the corporation; receive and give receipts for monies due and payable to the corporation from any source whatsoever, and deposit all such monies in the name of the corporation in such banks, trust companies or other depositories as shall be selected in accordance with the provision of Article VII of the Bylaws; ultimately responsible for the development of the Treasurer-Elect in all their duties, and perform all duties incident to the office of Treasurer and such other duties as from time to time may be assigned to him/her by the President or by the Board of Directors.

Section 10 – Treasurer-Elect. The Treasurer-Elect shall observe the duties performed by the incumbent Treasurer and normal business transacted by the Treasurer in preparation for his/her coming term as Treasurer and such other duties as may be prescribed by the Board of Directors from time to time. The Treasurer-Elect shall automatically assume the office of Treasurer during the subsequent membership year.
Section 11 - Secretary. Secretary shall: (a) keep the minutes of all meetings of the Board of Directors and Members; (b) see that all notices are duly given in accordance with the provisions of these Bylaws or as required by law; (c) have charge of all the corporate books, records and accounts and of the seal of the corporation is affixed to all documents the execution of which on behalf of the corporation under its seal is duly authorized; (d) keep register of the post office address of each Member which shall be furnished to the corporation by such Member; (e) sign with the President, or a Vice-President, certificates of Membership in the corporation; (f) have general charge of the books of the corporation; (g) in general perform all the duties incident to the office of Secretary, subject to the control of the Board of Directors; and, (h) update the Bylaws and Policy and Procedures Manual annually on all items approved by a vote of the Board and/or Voting Membership.

Section 12 - Representative-at-Large. Representatives-at-Large are expected to provide input to the Board representative of the interests and perspectives of the majority of members belonging to the particular sector which they represent. Any Representative-at-Large shall have such powers and perform such duties as may be delegated to him by the Board of Directors.

Section 13 - Assistant Treasurers and Assistant Secretaries. If required by the Board of Directors, the Assistance Treasurers shall give a bond for the faithful discharge of his/her duties in such sum and with such sureties as the Board of Directors shall determine. The Assistant Treasurers and Assistant Secretaries, in general, shall perform such duties as shall be assigned to them by the Treasurer or the Secretary or by the President or Board or Directors.

Section 14 - Expenses. By resolution of the Board of Directors, any officer and/or appropriate individual representing a member institution may be reimbursed by the corporation for any out-of-pocket expenses incurred by such officer and/or such persons in furtherance of the purposes of the corporation. The decision of the Board of Directors as to whether such out-of-pocket expenses were incurred in furtherance of the purposes of the corporation shall be conclusive.

Section 15 - Board Liaison: is a non-voting position(s) that can be added to the Board at the pleasure of the President. The person(s) can be used as an advisor, historian, confidant, or an additional sector representative. Duties are to attend and participate in all Executive Board meetings and functions and to perform specific duties as assigned by the President.

Article VI

Section 1 - Committees of Directors. The Board of Directors, by resolution adopted by a majority of the Directors in office, may designate and appoint one or more committees, each of which shall consist of two or more Members, which committees, to the extent provided in said resolution, shall have and exercise the authority of the Board of Directors in the management of the corporation, except that no such committee shall have the authority of the Board of Directors in reference to amending, altering or repealing the Bylaws; electing, appointing, or removing any Member of any such committee or any Director or officer of the corporation; amending the articles of incorporation; restating articles of incorporation; adopting a plan of merger or adopting a plan of consolidation with another corporation; authorizing the sale, lease, exchange or mortgage of all or substantially all of the property and assets of the corporation; authorizing the voluntary dissolution of the corporation or revoking proceedings therefore; adopting a plan for the distribution of assets of the corporation; or amending, altering or repealing any resolution of the Board of Directors which by its terms provides that it shall not be amended, altered or repealed by such committee. The designation and appointment of any such committee and the delegation thereto of authority shall not operate to relieve the Board of Directors, or any individual Director, of any responsibility imposed upon it or him/her by law.

Section 2 - Other Committees. Other committees not having and exercising the authority of the Board of Directors in the management of the corporation may be appointed in such manner as may be designated by a resolution adopted by a majority of the Directors present at a meeting at which a quorum
is present. Except as otherwise provided in such resolution, Members of each committee shall be Members of the corporation, and the President of the corporation shall appoint the Members thereof. Any Member thereof may be removed by the person or persons authorized to appoint such Member whenever in their judgment the best interests of the corporation shall be served by such removal.

Section 3 - Term of Office. Each Member of a committee shall continue as such until the Transition meeting or the end of the current membership year and until his successor is appointed, unless the committee shall be sooner terminated, or unless such Member be removed from such committee, or unless such Member cease to qualify as a Member thereof.

Section 4 - Chairman. One Member of each committee shall be appointed chairman by the person or persons authorized to appoint the Members thereof.

Section 5 - Vacancies. Vacancies in the Membership of any committee may be filled by appointments made in the same manner as provided in the case of the original appointments.

Section 6 - Quorum. Unless otherwise provided in the resolution of the Board of Directors designating a committee, a majority of the whole committee shall constitute a quorum and the act of a majority of the Members present at a meeting at which a quorum is present shall be the act of the committee.

Section 7 - Rules. Each committee may adopt rules for its own government not inconsistent with these Bylaws or with rules adopted by the Board of Directors.

Article VII - CONTRACTS, CHECKS, DEPOSITS AND FUNDS

Section 1 - Contract. The Board of Directors may authorize any officer or officers, agent or agents, in addition to those officers so authorized by these Bylaws, to enter into any contract or execute and deliver any instrument in the name of and on behalf of the corporation, and such authority may be general or confined to specific instances.

Section 2 - Checks, Drafts, etc. All checks, drafts or orders for the payment of money, notes or other evidence of indebtedness issued in the name of the corporation, shall be signed by such officer or officers, agent or agents of the corporation and in such manner as shall from time to time be determined by resolution of the Board of Directors. In the absence of such determination by the Board of Directors, such instruments shall be signed by the Treasurer, Treasurer-Elect and/or Assistant Treasurer and countersigned by the President or Vice President of the corporation.

Section 3 - Deposits. All funds of the corporation shall be deposited from time to time to the credit of the corporation in such banks, trust companies or other depositaries as the Board of Directors may select.

Section 4 - Gifts. The Board of Directors may accept on behalf of the corporation any contribution, gift, bequest or device for the general purpose or for any special purpose of the corporation.

Article VIII - CERTIFICATES OF MEMBERSHIP

Section 1 - Certificates of Membership. The Board of Directors may provide for the issuance of certificates evidencing Membership in the corporation, which shall be in such form as may be determined by the Board. Such certificates shall be signed by the President or a Vice President and by the Secretary or an Assistant Secretary and shall be sealed with the seal of the corporation. All certificates evidencing Membership of any class shall be consecutively numbered. The name and address of each Member and the date of issuance of the certificate shall be entered on the records of the corporation. If any certificate shall become lost, mutilated or destroyed, a new certificate may be issued therefore upon such terms and conditions as the Board of Directors determine.

Section 2 - Issuance of Certificates. When a member has been elected to Membership and has paid any initiation fees and dues that may then be required, a certificate of Membership may be issued in his/her name
and delivered to him/her by the Secretary, if the Board of Directors may have provided for the issuance of certificates of Membership under the provisions of Section 1 of this Article VIII.

Section 3 - Dividends. Membership in this corporation shall be non-dividend bearing.

Article IX - BOOKS AND RECORDS

The corporation shall keep correct and complete books and records of account and shall also keep minutes of the proceedings of its Members, Board of Directors and committees having any of the authority of the Board of Directors, and shall keep at its registered or principal office a record giving the names and addresses of the Members entitled to vote. Any Member, or his agent or attorney may inspect all books and records of the corporation, for any proper purpose at any reasonable time.

Article X - FISCAL YEAR

The fiscal year of the corporation shall begin on the first day of January and end on the last day of December in each year.

Article XI - DUES

Section 1 - Annual Dues. The Board of Directors may determine from time to time the amount of initiation fee, if any, and annual dues payable to the corporation by Members of each class.

Section 2 - Payment of Dues. Dues shall be payable in advance of the first day of July in each fiscal year. Dues of the new member shall be the total annual amount set by the Board of Directors regardless of the point during the membership year that such new member applies for membership.

Section 3 - Default and Termination of Membership. When any Member of any class shall be in default in the payment of dues for a period of 6 months from the beginning of the fiscal year or periods for which such dues became payable, his/her Membership shall thereupon be terminated by the Board of Directors in the manner provided in Article III of the Bylaws.

Section 4 - The President of the Corporation will be enrolled as a Member of the Western Association of Student Financial Aid Administrators by the Treasurer with the dues being paid by the Corporation.

Section 5 - The Membership year shall be from July 1 to June 30 with dues being due and payable to the Treasurer July 1.

Article XII - SEAL

The Board of Directors shall provide a corporate seal, which shall be in the form of a circle and shall inscribed thereon the name of the corporation and the words "Corporate Seal".

Article XIII - WAIVER OF NOTICE

Whenever any notice is required to be given under the provisions of the Arizona Non-profit Corporation Act or under the provisions of the articles of incorporation of the Bylaws of the corporation, a waiver thereof in writing signed by the person or persons entitled to such notice, whether before or after the time stated therein, shall be deemed equivalent to the given of such notice.

Article XIV - AMENDMENTS TO BYLAWS

These Bylaws may be altered, amended or repealed and new Bylaws may be adopted by a majority of the voting members present at any regular meeting or at any special meeting, either in person, electronically or by mail, if at least two days' written notice is given of intention to alter, amend or repeal of to adopt new Bylaws at such meeting.
SECTION 3:
GENERAL POLICIES

3.1 ALCOHOL POLICY

AASFAA will not reimburse Members or individuals for alcoholic beverages in conjunction with Board of Directors Meetings, Business Meetings, Special Meetings and/or Committee Meetings. The Conference Committee Chair is authorized, at their discretion and with the Board of Directors approval, to include alcoholic beverages at meals and/or receptions which are part of a sponsored or sanctioned event in conjunction with either of the semi-annual conferences or the annual Transition Meeting.

3.2 ANNUAL DUES

Annual membership dues shall be collected on an institutional, associate or individual specific basis for $75.00 per year. Dues shall be due by August 1 of the upcoming membership year and shall be requested through coordinated efforts between the Membership Committee and the Office of Treasurer.

3.3 ASSOCIATION SEAL

The corporate seal of the Association is retained by the Secretary who should ensure it is affixed to official association documents. Failure to affix the seal to corporate documents shall not affect or impact the validity of the documents.

3.4 AUTHORITY NOT DESIGNATED IN ARTICLES OF INCORPORATION AND/OR BYLAWS

All authority not specifically delegated within the Association's Articles of Incorporation and/or Bylaws (i.e. issues of sponsorship being comprehensively assigned to Fiscal Planning and Development), and not expressly delegated by the Association's Board of Directors and/or President, is comprehensively and completely reserved for, and empowered to the Board of Directors and can only be delegated in a manner consistent with the Articles of Incorporation and/or Bylaws or, when no direction is provided within said documents, only by a majority vote of a quorum of the Board of Directors.

3.5 CODE OF CONDUCT

All representatives of the Association, written or verbal, by any Member or individual, are to positively portray the Association, its members and activities in a manner of high integrity and professionalism and without consideration of personal and/or corporate gain.

In the event of any individual within AASFAA, whose conduct is determined to be unbecoming of the Association, after enacting the Disciplinary Review Process, he/she will be immediately removed from any position of authority within the Association, and may have their rights to participate within the Association revoked as governed within the Bylaws.

3.6 CONTRACT SIGNING/NEGOTIATION POLICY

Only the President, Treasurer or President's delegate(s) are approved to sign any contract(s), which subject AASFAA to liability and/or financially obligates AASFAA. All negotiated contract(s) will be forwarded to the Treasurer, and all impacted Committee Chairs, for review, and acceptance by each, as soon as available but not later than thirty (30) days prior to the deadline for signature as indicated by the proposed contracted party.

3.7 DEPOSITORY AND ACCESS FOR ASSOCIATION FUNDS

All funds of the Association shall be retained within accounts maintained by a Board approved financial
institution. This shall include, but is not limited to, an operational account, appropriate investment vehicles as identified in the investment policy, and up to three (3) credit cards to be held in tandem by each Office of President, Treasurer, and a Board Member of Committee Chair at the discretion of the President, along with the Association (both names to appear on each card). All reporting and reconciliation of such accounts shall be the responsibility of the Office of Treasurer.

3.8 DISCIPLINARY REVIEW PROCESS

Upon receipt of a complaint from any individual against an individual within AASFAA or an individual acting on behalf of the Association, the Past President shall determine if the parties involved have exhausted all reasonable attempts to resolve their dispute. Should the Past-President determine the complaint is unresolved he/she shall initiate a fact-finding process to determine if this is a valid issue from which the Association's Code of Conduct could be or has been compromised. If the Past-President's fact-finding efforts affirm the need for the Association to become involved, a Disciplinary Review Process shall be initiated. This Review process shall proceed as follows:

1. A time and date shall be established when a quorum of the Board will be present and all involved parties shall be invited to attend:
   a. This Review will proceed regardless of the ability/ inability of any invited party to attend provided the Board quorum and the Past President are present.

2. Said session will be conducted as a closed meeting of the Board of Directors.

3. The complaint shall be reviewed by the Board of Directors along with the results of the fact-finding effort pursued by the Past President. Each party will be afforded the opportunity to make their comments and substantiate their position.

4. After hearing each position, the Board shall determine if any disciplinary action is appropriate and the extent of any such action (i.e. admonishment, public apology, loss of position, etc).

5. The decision of the Board will be final and not subject to appeal.

3.9 EDITORIAL POLICY

Advocate

AASFAA welcomes expression of all views. Submissions to the AASFAA Advocate must be brief and are subject to condensation. The author(s) may request their names be withheld from printing however, their name(s), signature(s) and telephone number(s) must be included with their submission. Article submission does not guarantee publication. Opinion(s) expressed in the AASFAA Advocate are solely those of the author(s) and do not necessarily represent those of Association and/or the author(s)'s institution.

Listserve
Advertising on the AASFAA Listserve - general guidance:
1. Messages should be related to financial aid or concerns of the association.
2. Test messages are not permitted
3. Subscriptions for individuals whose e-mail is generating an “autoreply” indicating their absence should unsubscribe or suspend their subscriptions prior to their absence.
4. Posting shall not include cc’s or bcc’s.
5. Virus messages, email scams and the like are not permitted, individual institutions, organizations should have policies and virus software in place prior to utilizing the listserv.
6. Messages shall only be posted in plain text
7. No limits to length of posting
8. Members and/or non-members may post to the listserv
9. Associate members must not include logos or advertisements

3.10 VENDOR POLICY

This policy will serve and assist the Association as well as its many sponsors and vendors. (Not all scenarios have been, or could be addressed in this policy. Hence, this policy is meant to be followed precisely when it applies and also to be flexible enough to consider variations receiving prior approval through the Fiscal Planning and Development Committee.) All sponsorships should be approved through the Fiscal Planning and Development Committee to insure quality control and an equal opportunity for all that wish to contribute. The policy has been developed with levels of contributions/sponsorship for various events/activities and can be found in Appendix F.

Procedures
All solicitation for sponsorship will be carried out by the Fiscal Planning and Development Committee chairs or their designees only. All vendors will be given the opportunity to indicate areas and extent of sponsorships at the beginning of each fiscal year. Each vendor will also be extended an opportunity to assist with other needs of the association as they are available throughout the fiscal year.

All items for sponsorship will be offered on a first come, first serve basis. Any agenda item listed at an event is considered to be organized by AASFAA as well as any promotional activities coordinated through the Association. Other items such as a hospitality suite or other functions that do not appear on the agenda are not governed by AASFAA or this Policy.

Raffles or drawings must be held in accordance with the following guidelines: Vendors/Exhibitors may have drawings at the vendor's location only. This should be coordinated with the Fiscal Planning and Development Committee contact person(s).

All brochures and promotional items to be distributed at a meal or a session must be distributed in the following manner: The materials must be in the room at each chair before the session begins or may be passed out at the conclusion of the event by a representative. Distribution would not be allowed, for example, while people are eating a meal.

3.11 GOVERNING LAW

Governing law for all legal matters brought before, or against, the Association shall be the Arizona Revised Statues.

3.12 INVESTMENT POLICY

The funds of the Association may be invested from time to time in investment instruments that are marketed as being “conservative”. These instruments may include but are not limited to: equity, bonds, mutual funds, commodities or other interest bearing accounts. The operational account of the Association
must be maintained only in a 100% FDIC insured account.

3.13 **LATE FEES**

AASFAA can charge those individuals and/or institutions a late fee if their registration fees are not paid on time (by the first day of the fall conference).

3.14 **MEETINGS**

**3.14.1 Board of Directors**

Regular meetings of the Board of Directors shall convene no fewer than four (4) times each fiscal year. These meetings shall convene during the semi-annual meetings of the membership, an annual Transition Meeting, and at least one other time for the purpose of approving the Association's annual budget. These and other meetings of the Board of Directors may be convened, and proceed within the guidelines of the Articles and Bylaws.

**3.14.2 Business Meetings**

Business Meetings shall be convened at each semi-annual conference or as allowed within the Articles of Incorporation and/or Bylaws.

**3.14.3 Committee Meetings**

Committees shall convene as often as necessary to achieve the goals identified by the Board of Directors and within the Policies and Procedures Manual.

3.15 **MEMBERSHIP LISTING ACCESS**

Access to a listing of AASFAA members shall be provided at no charge for activities related to AASFAA business. Member listing information shall be provided either through labels, paper listing, or electronic format utilizing the AASFAA program and layout - no programmed customization shall be provided. Requests for listings for activities unrelated to AASFAA sanctioned business, a charge of $75.00 shall be charged to member institutions. For non-member requests, the $75.00 membership fee shall be assessed in addition to the $75.00 list access fee. The remittance of the membership fee shall afford the requesting organization and/or individual the full rights of membership for the balance of current year. No prorating of the membership fee shall be granted. The Membership Committee shall notify the Treasurer of any need to bill for payment of list/membership charges. List requests shall be directed to, and provided by, the Treasurer.

3.16 **REFUND AND CANCELLATION POLICY**

**3.16.a Cancellation and Refund Policy for AASFAA EVENTS (Conferences, Trainings, etc.):**

The registration cancellation deadline for all AASFAA events will be 7 calendar days prior to the start date of the event. Full cancellation refunds will be processed automatically for registrations canceled by this deadline minus any membership fees, if applicable. All other requests for refunds received after the 7 calendar days prior to start of the event deadline must be submitted in writing. Members must include the name of the participant who is canceling, the reason for the request and the address to which a refund check, if the request is approved, should be mailed. Should the refund request be approved, an administrative fee of $25 may be applied prior to the refund being processed. The request for refund must be sent to the AASFAA Treasurer at:
3.16.b Vendor Support:

AASFAA is able to provide many of its benefits to the Association membership in large part due to the generous support of the vending community. As a result, AASFAA requests that all vendor support payments be made in full within 30 days of generating an invoice. No refunds will be made after payment is received. If you feel you have an extenuating circumstance, you may submit a written request to the Treasurer for consideration to refund the fees. Please include the name of the vendor, the reason for the request and the contact person’s information (name, email and phone number) to send the final decision to. Send your request to the AASFAA Treasurer at: P. O. Box 55883, Phoenix, AZ 85078. Or email the current Treasurer at the email listed on http://www.aasfaa.org/docs/committees/BoardDirectors/index.html.

3.17 REIMBURSEMENT

AASFAA shall reimburse any expenses directly incurred in the advancement of Association business and related to their official AASFAA responsibilities, up to the approved budgetary limitations and/or as approved within Article V, Section 14 of the Bylaws.

Reimbursements will be processed only upon receipt of an accurately completed Request for Reimbursement Form (Appendix A) with all appropriate documentation attached and approved signatures.

Receipts for expenses exceeding $25.00 are required for any reimbursement to be processed.

Reimbursements shall not be available for participation at non-mandatory functions unless a potential reimbursement is approved in advance of the activity (i.e. any individual or Committee Chair who opts to attend a Board meeting at which their appearance was not mandatory).

Claims for reimbursement must be submitted within thirty (30) days of the incurrence.

3.18 RESERVE FUND POLICY

AASFAA will maintain, and retain, an account separate from all other AASFAA accounts, in an interest bearing depository instrument insured against loss of corpus, selected at the Board of Directors’ discretion, of not less than the amount necessary to fund six (6) months of AASFAA expenses plus any amount necessary to pay, in full, any outstanding instrument of indebtedness obligated to AASFAA. This fund shall be liquidated for only two (2) purposes:

1.) To fully honor/repay any outstanding indebted obligation of AASFAA in the event of AASFAA’s dissolution; and,

2.) To fund all non-discretionary expenses which may arise and are associated with the dissolution of AASFAA for a period not to exceed six (6) months.

Any balance remaining in this Account after all AASFAA debts have been honored and non-discretionary operational expenses have been incurred and paid, one of the final acts of the Association shall be to disburse the remaining funds in a method consistent with that indicated in Article XI of the Arizona Association of Student Financial Aid Administrators, Inc., Articles of Incorporation.

3.19 RETENTION OF RECORDS

A copy of minutes, reports and/or records from any/all Association meetings (i.e. Board of Directors, Committees, Business, Special, etc.), shall be forwarded to, and permanently retained by the Archivist designated by the Board of Directors. Additionally, a copy of all materials produced (i.e. agendas,
videos, attendee lists, etc.) from any AASFAA activity (i.e. Conference, mailings, Seminars, etc.), shall also be so forwarded from the appropriate point of authority and retained by the Archivist.

SECTION 4:
ADMINISTRATION

4.1 BOARD OF DIRECTORS

4.1.0 General

4.1.0.a Budgetary Responsibility

The Board is responsible for establishing an annual budget from the requests submitted from each Committee/Task Force and the Board itself. The Board shall receive a compilation of budgetary recommendation for both expenditures and revenues from the Chair/Co-Chair of Fiscal Planning and Development. The Board of the Association is obligated to make a balanced budget within sixty (60) days from the start of each fiscal year.

4.1.0.b Committee Liaison Responsibility

Each Member of the Board of Directors will serve as Board Liaison to at least one of the Committees established by the President. The Liaison shall act as the Board's voice on the Committee and shall represent the Committee before the Board should the Chair/Co-Chair be unavailable. The Liaison shall ensure that all Committee activity is managed responsibly, in the best interest of the Committee, the Board of Directors, the Membership, and the Association.

4.1.0.c Committee Task Force Designations

The President shall disseminate General Committee policies and procedures to each selected Chair/Co-Chair along with their specific committee assignments sheets. In the event of new Committees being established, the President shall complete Appendix E for each new Committee/Task Force and ensure the information is updated, as required, in this Manual. All Board members shall review and approve all Committee/Task Force guidelines and adjustments.

4.1.0.d Expense Reimbursement Approval

In the case of a Member of the Board of Directors completing and submitting a Request for Reimbursement form, the reimbursement must meet the approved policy or the guidelines of Article V, Section 14 of the Bylaws. The Board Member's request must be approved by the signature of the President. In the case of the President, the request must be approved by the Vice President.

4.1.0.e Fiduciary Responsibility

Each member of the Board of Directors will ensure that any expense incurred through committee and/or Board action, in the furtherance of AASFAA business, be incurred
tax free to the extent allowed by law. This shall occur through the presentation to vendors/sponsors of documentation verifying AASFAA’s tax exempt, non-profit status.

4.1.0.f  Permission to Use Access

The Board of Directors shall be ultimately responsible to ensure appropriate submission of fees and permission to reproduce copy written material are facilitated. This shall include, but is not limited to, payment of fees to both national music copyright houses (BMI and ASCAP) and appropriate permission to reproduce written material(s) for any and all Association sanctioned activities and events.

4.1.0.g  Record Retention and Facilitation

The Board of Directors shall be responsible for annually designating an Archivist for the collection and retention of all Association materials and errata. The Board shall notify all appointed and elected positions of the delivery point for archive material. Should the Board elect to change the Archivist and/or the location of material retention, the Board shall be solely responsible for the transfer of all archived material to the newly designated location.

4.1.0.h  Responsibility for Financial Integrity

The Board of Directors shall have obligation, as a whole, to review at each scheduled meeting of the Board of Directors, prepared income and expense reports as prepared by the Treasurer.

4.1.0.i  Responsibility of Office

Each member of the Board of Directors shall faithfully discharge all responsibilities associated with their elected/appointed post as stated in the Articles of Incorporation, the Bylaws and/or the Policies and Procedures.

4.1.0.j  Sector Representation

Each member of the Board of Directors shall be the designated representative for the membership sector in which they are employed, and be the communication conduit to, and from, their respective sector.

4.1.0.k  Tax Filing

The Board of Directors shall be responsible for ensuring the completion of all required tax filings, of any governmental sector, within any applicable timelines.
4.2 OFFICE DESCRIPTIONS

OFFICE: President

TERM: One year. Commencing at Transition Meeting or July 1, whichever comes first.

FUNCTION: Serve as the Chief Executive Officer of the Association

COMMITTEE LIAISON: Conference, Site Selection

MEMBER ON: Nominations and Elections Committee

RESPONSIBILITIES: Provide leadership and direction to all activities of the Association, the Board of Directors and all committees and task forces.

Serve as official representative of the Association and the Board of Directors.

Appoint all Chairpersons of committees and task forces and serve as ex officio member of all committees and task forces.

Assign each Board Member to liaison a committee.

Develop calendar of AASFAA and other related activities.

Disseminate information promptly to the Membership.

Disseminate to each Board member, at the annual Transition Meeting, the appropriate office description form, completed where necessary, delegating responsibility as he/she deems appropriate for their term of office.

Submit an annual report to the Secretary and presents same to the Board of Directors.

Submit all receipts for expenses applied to the AASFAA Credit Card to the Treasurer at the end of each month for reconciliation and payment.

Serve as a member of the WASFAA Executive Council.

OTHER ASSIGNED DUTIES: Perform other duties as requested or delegated by the Board of Directors.
OFFICE: Past President

TERM: One year. Commencing at Transition Meeting or July 1, whichever comes first.

FUNCTION: Serve as member of the Board of Directors. Participate in the decision making process of the Board.

COMMITTEE LIAISON: Awards and Scholarships Committee

MEMBER ON: Nominations and Elections, Chair

RESPONSIBILITIES: Initiate Fact Finding efforts as determined necessary under the Code of Conduct and/or Disciplinary Review Process.

Provide historical perspective during meetings and discussion of the Board of Directors. Act as Parliamentarian at all scheduled AASFAA Business Meetings and meetings of the Board of Directors. Assist with parliamentary procedures in other Association meetings as requested.

OTHER ASSIGNED DUTIES: Perform other duties as assigned by the President or delegated by the Board of Directors.
OFFICE: President-Elect

TERM: One year. Commencing at Transition Meeting or July 1, whichever comes first.

FUNCTION: Serve as a member of the Board of Directors and participates in the decision making process of the Board. Learn duties required of the President and the organizational structure of the Association.

COMMITTEE LIAISON: Nominations and Elections

MEMBER ON: Nominations and Elections Committee
Policies and Procedures Task Force

RESPONSIBILITIES: Assist in the financial audit of the Association which is to be conducted every year or every other year based on the discretion of the Board of Directors. Responsible for selection of an ad hoc committee to oversee this process.

Attend NASFAA Leadership Conference

Formulate strategy of goals to accomplish during their Presidency

Network with member institutions to assist in identify Committee Chairs and Representatives at Large positions during their Presidency.

OTHER ASSIGNED DUTIES: Perform other duties as assigned by the President or delegated by the Board of Directors.
OFFICE: Vice President

TERM: One year. Commencing at Transition Meeting or July 1, whichever comes first.

FUNCTION: Serve as a member of the Board of Directors and participates in the decision making process of the Board. Perform the duties of the President in the President's absence in accordance to the By-laws. Perform such duties as are assigned by the President or prescribed by the Board of Directors.

COMMITTEE LIAISON: Information and Technology, Site Selection

MEMBER ON: Policies and Procedures Task Force

RESPONSIBILITIES: Perform all duties of the President in the event of his/her absence and/or incapacity in accordance to the By-laws.

Maintain, update, clarify and provide historic perspective on all items addressed in the Policy and Procedure Manual.

Review financial statements, bank statements, and tax returns of the Association.

Signing authority for all activities and obligations of the Association included but not limited to: Conference sites and tax returns.

OTHER ASSIGNED DUTIES: Perform other duties as assigned by the President or delegated by the Board of Directors.
OFFICE: Treasurer

TERM: One year. Commencing at Transition Meeting or July 1, whichever comes first

FUNCTION: Serve as a member of the Board of Directors and participates in the decision making process of the Board. Perform duties associated with the payment of funds and related duties. Facilitates the training of the Treasurer Elect.

COMMITTEE LIAISON: Fiscal Planning and Development Committee

MEMBER ON: Fiscal Planning and Development Committee

RESPONSIBILITIES: Disburse Association funds throughout the year and during any Association sponsored project/activity (i.e. conferences, functions, etc.).

Maintain adequate and appropriate records of all transactions including expense accounting for all committees and task forces.

Prepare the annual filing of tax records and either performs the filing or recommends to the Board an agency to produce the tax filing.

Assist the Executive Board with the formulation of an annual budget, recommending financial policies and fund raising strategies.

Process claims for reimbursements and verifies all required documentation and signatures are included prior to disbursement of reimbursement.

Provide, at least one (1) week prior to each Board meeting, monthly reports of all income and expenses, by committee, to each Board member and each Committee Chair/Co-Chair. Upon request, will provide such reports to any individual from a member institution.

Collect and reconcile credit card receipts from the President and President-Elect and any other Board Member or Committee Chair selected at the discretion of the President each month end and prepares a report of such expenditures, along with the monthly statements from Chase, Arizona, for submission to the Vice President for their review and confirmation.

Prepare an annual audit of all AASFAA records to be reviewed by the Vice President and the ad hoc committee chaired by the President Elect.

Maintain and retain, for a period of three (3) years, all invoices, reimbursement claim forms, cancelled checks, contracts, financial reports, tax returns, bank statements and other such documents pertaining to receipt and reimbursement of funds either by paper or electronic. At the end of the three-year period, the Treasurer shall forward all such records to the Archives Committee for historical retention.

Surrender such records as indicated above at the close of their term of office to the incoming elected Treasurer.

Utilize established software and formats for report presentation and tracking and advises Board on required updates to software and form recommendations.
Oversee the duties of the Treasurer-Elect and facilitates the training of the Treasurer-Elect so they can transcend into the Treasurer position after the completion of their one-year term.

**OTHER ASSIGNED DUTIES:** Perform other duties as assigned by the President or delegated by the Board of Directors.
OFFICE: Treasurer-Elect

TERM: Two year term (one year served as Treasurer-Elect and one year as Treasurer)
Commencing at Transition Meeting or July 1, whichever comes first.

FUNCTION: Serve as a member of the Board of Directors and participates in the decision making process of the Board. Perform duties associated with the collection of funds and related duties. Learn all aspects of the position of Treasurer to enable them to assume the Treasurer position at the end of their term as Treasurer-Elect.

COMMITTEE LIAISON: Membership; Fiscal Planning and Development

MEMBER ON: Fiscal Planning and Development

RESPONSIBILITIES: Work in conjunction with the Treasurer to:

- Receive Association funds throughout the year and during any Association sponsored project/activity (i.e. conference, functions, etc.).
- Maintain adequate and appropriate records of all incoming transactions, including expense accounting for all committees and task forces.
- Review all financial statements for month end.
- Maintain membership records and coordinate with the Membership Committee to facilitate the annual collection of membership dues.
- Maintain sponsorship records and coordinates with Fiscal Planning and Development to facilitate the collection of sponsorship fees.
- Provide membership information to Association offices, committees and individual members free of charge.
- Assess a fee of $75 for a label set or printout of Institutional Membership for business requests unrelated to AASFAA as he/she may determine.
- Perform the duties of the Treasurer in the Treasurer’s absence.

OTHER ASSIGNED DUTIES: Performs other duties as assigned by the President, Treasurer, or delegated by the Board of Directors.
OFFICE: Secretary

TERM: One year. Commencing at Transition Meeting or July 1, whichever comes first.

FUNCTION: Serve as a member of the Board of Directors and participates in the decision making process of the Board. Acts as Recording Secretary for the Board of Directors and general Association meetings.

COMMITTEE LIAISON: Newsletter

MEMBER ON: Policies and Procedures Task Force

RESPONSIBILITIES: Record minutes of Board meetings and distributes to Board members within one month. Records minutes of all other AASFAA meetings and makes them available at the next conference or meeting.

Attach any pertinent information to the minutes for distribution.

Collect and forward pertinent information and correspondence to the AASFAA Archives Committee at the conclusion of the fiscal year. Prepare mailings to the Membership as directed.

Retain the official seal of AASFAA Inc., and ensures to their best ability that it is affixed to official corporate documents.

Maintain the AASFAA tape recorder for utilization at their discretion.

OTHER ASSIGNED DUTIES: Perform other duties as assigned by the President or delegated by the Board of Directors.
OFFICE: Representative-at-Large

TERM: One year. Commencing at Transition Meeting or July 1, whichever comes first.

FUNCTION: Serve as a representative of the general postsecondary and/or non-postsecondary membership to the Board of Directors. Participate in the decision making process of the Board.

COMMITTEE LIAISON: Awards and Scholarships; Awareness and Outreach; Diversity

MEMBER ON: Policies and Procedures Task Force

RESPONSIBILITIES: Provide input to the Board representative of the interests and perspectives of the majority of members belonging to the sector that is represented.

OTHER ASSIGNED DUTIES: Perform other duties as assigned by the President or delegate by the Board of Directors.
OFFICE: Board Liaison (s)
TERM: One year. Commencing at Transition Meeting or July 1, whichever comes first.
FUNCTION: Serve as an additional (non-voting) member of the Executive Board of Directors, and can be asked to fill the role of advisor, historian, confidant, or additional sector representative.
COMMITTEE LIAISON:
MEMBER ON: Policies and Procedures Task Force
RESPONSIBILITIES:
OTHER ASSIGNED DUTIES: Perform other duties as assigned by the President or delegated by the Board of Directors.
4.3 COMMITTEES

4.3.0 Purpose

Committees established by the Board of Directors are initiated to achieve and advance the common goals of said Committee and/or the Association at large by performing the duties and responsibilities indicated below and/or other duties and responsibilities which may be approved and/or requested by the Board of Directors.

4.3.1 General Committee Guidelines

4.3.1.a Responsibilities of Chairs/Co-Chairs

4.3.1.a.i Budget Preparation/Submission

Each Chair/Co-Chair, in conjunction with Committee Members and Liaison, will prepare a budget for submission to the Board of Directors. Forms for budget preparation are located in Appendix C and include the Committee Budget Request Form (one (1) per project) and the Income Statement when any income is anticipated. These are to be submitted to the Chair/Co-Chair of the Fiscal Planning and Development Committee by the deadline indicated. Committees not requesting funding shall submit the required forms so indicating.

Each Committee Chair/Co-Chair requesting funding will attend the Board of Director's meeting which is indicated to be established for the purpose of setting the annual budget and will be expected to expand upon their requests at the Board's desire.

4.3.1.a.ii Fiduciary Responsibility

Each Committee Chair/Co-Chair will ensure that any expense incurred through committee action in the furtherance of AASFAA business be incurred tax free to the extent allowed by law. This shall occur through the presentation to vendors of documentation verifying AASFAA's tax exempt, non-profit status.

Each Committee Chair/Co-Chair is expected to conserve AASFAA's funds by keeping expenses to the minimal amount necessary to satisfactorily conduct AASFAA business and through efforts with the Fiscal Planning and Development Committee to identify other sources of revenue to cover expense whenever possible.

4.3.1.a.iii Meeting Planning

Each Chair/Co-Chair will, for all Committee meetings, communicate with all members and the Committee Liaison providing sufficient notice for each member to attend.

4.3.1.a.iv Newsletter Submissions

Each Chair/Co-Chair shall prepare, or ensure the preparation of, submission of a Committee update by the deadlines established by the Editor, prior to each production of the AASFAA Advocate, to the Editor of said publication as provided by these procedures.
4.3.1.a.v Participant Submission to Awards and Scholarships Committee

Prior to Chair/Co-Chair transitioning responsibilities to the subsequent year's Chair/Co-Chair, a list of committee members will be submitted to the current Chair/Co-Chair of the Awards and Scholarship Committee. This list must be inclusive of all members and Chair(s), and be correctly spelled.

4.3.1.a.vi Reporting

Each Committee Chair/Co-Chair shall ensure that minutes of each Committee meeting are taken and are available for submission to the Board upon their request. Further, these records, and all other Committee errata, shall be provided both to the incoming Committee Chair/Co-Chair for the subsequent year as well as a copy being submitted to the Archivist.

Each Chair/Co-Chair shall prepare an annual report and submit it within the time frame identified by the Board of Directors for each year and shall include said report in the materials forwarded to the incoming Committee Chair/Co-Chair and the Archivist.

Each Chair/Co-Chair will review the applicable committee section of the Policies & Procedures manual and make recommended updates as part of the annual report and submit to the designated person(s) and within the time frame identified by the Board of Directors.

Each Chair/Co-Chair shall be prepared to present updates at each Business Meeting of the Association and at each Board Meeting at which such report is requested. If unable to attend and present a report, the Chair/Co-Chair will brief their Board Liaison, in writing, prior to the identified meeting so they are able to present the necessary report on their behalf.

Each Committee Chair/Co-Chair will develop a calendar of activities, meetings and projects for use by each Committee Member and review of the Board upon request.

4.3.1.a.vii Requests for Reimbursement

Each request for reimbursement by Committee members will be signed by the Committee Chair/Co-Chair prior to submission. In the event of the Chair/Co-Chair requesting reimbursement, the Board Liaison to the Committee shall sign these requests prior to submission to the Treasurer. The signature approving any expense reimbursement shall be accepted as verification that said reimbursement has been previously approved within the Committee’s budget unless otherwise decided by the Board of Directors according to Article V, Section 14 of the Bylaws.

4.3.1.b Responsibilities of Committee Liaisons

4.3.1.b.i Committee Participation
Each Liaison is expected, to the extent possible, to attend each meeting of their respective Committee to act as the voice of the Board of Directors and the earpiece of the Board. The Liaison should be fully prepared to keep the Board advised of all activities of their respective Committee and, if necessary, provide a report to the Board or at the Business Meetings regarding all activities of their assigned Committee.

4.3.1.b.ii Record Retention Responsibility

The Board Liaison to each committee shall ensure the maintenance of the archival efforts by notifying their respective committee of the location to forward archival material and confirming such action is taken with all committee materials and errata.

4.3.1.b.iii Requests for Reimbursement

Any request for reimbursement of expense from a Committee shall be signed by that Committee’s Chair, Co-Chair, or Board Liaison prior to submission for payment to the Treasurer. The signature approving any expense reimbursement shall be accepted as verification that said reimbursement has been previously approved within the Committee’s budget unless otherwise decided by the Board of Directors according to Article V, Section 14 of the Bylaws.

4.3.1.c Selection of Committee Members

Each Committee shall be structured so as to include representation from no fewer than four of the five identified sectors within the Association unless otherwise directed, in writing by the President. Along with type of institution, factors such as race and gender should be considered so the Committee makeup, to the extent possible, reflects the makeup of the Association at large. Each Committee may be larger than this minimum as determined necessary by the Chair/Co-Chair to achieve the goals designated to that Committee by the President and/or the Board of Directors.

4.3.1.d Responsibilities of Committee Members

4.3.1.d.i Committee Participation

Each individual agreeing to serve on an AASFAA Committee, is expected to fully participate in all activities of their Committee and attend each meeting established by the Chair/Co-Chair. If the Committee Member is unable to attend a meeting, they shall take it upon themselves to ensure they are brought current on the activities the Committee during the meeting at which they were not in attendance, prior to the next Committee meeting.
4.3.1.d.ii Fiduciary Responsibility

Each Committee member is expected to conserve AASFAA’s funds by keeping expenses to the minimal amount necessary to satisfactorily conduct AASFAA business and by identifying to the Chair/Co-Chair other sources of potential revenue, which they should explore in consultation with the Fiscal Planning and Development Committee.

4.3.1.d.iii Requests for Reimbursement

Any expense for which the Committee Member anticipates requesting reimbursement will be provided to the Committee Chair/Co-Chair during the budget process so it may be included in expenditure determination. Requests not included in a Committee’s budget must be approved as indicated in Article V, Section 14 of the Bylaws.

Requests for expense reimbursement from a Committee Member must be submitted on the approved Expense Reimbursement Form (Appendix A), must bear the signature of your Committee Chair/Co-Chair, and must include receipts for all items in excess of $25.00 prior to submission to the Treasurer for payment.

4.3.2 Awards and Scholarships

4.3.2.a Function

Promote the availability of, solicit the nominees for, and make selections and/or recommendations for recipients of the following:

- AASFAA Student Scholarship(s) (if funded);
- John Medley Financial Aid Advocacy Award;
- Robert Thompson Memorial Leadership Award;
- WASFAA Conference Scholarship(s);
- WASFAA Summer Institute Scholarship(s) renamed WASFAA Sister Dale Brown Summer Institute Scholarship(s);
- WASFAA Jerry R. Sims Management & Leadership Institute Scholarship;
- AASFAA’s Conference Scholarship(s);
- Federal Student Aid Conference Scholarship;
- NASFAA Conference Scholarship;
- AASFAA Association Leadership Award; and,
- Other awards and gifts as directed by the Board of Directors.

4.3.2.b AASFAA Student Scholarship

4.3.2.b.i Purpose

The AASFAA Student Scholarship is to promote the advancement of the financial assistance profession through the distribution of scholarships to students at Arizona's postsecondary institutions. Nominees are solicited from all regular members of the Association. Each AASFAA regular member institution may nominate a single individual to potentially receive one of the available scholarships. Scholarships are one time awards for no more than $500.00. The Criteria to be nominated includes the following:

1. Attending an AASFAA Member postsecondary institution.
2. At least halftime attendance;
3. Has financial need as defined by the nominator; and,
4. Enrolled in a program leading to a degree or certificate.

Preference will be given to those individuals who demonstrate an interest in financial assistance as a profession (i.e. FWS students in the financial assistance office, financial assistance staff going to school). GPA will be considered, if necessary, in the selection process.

4.3.2.b.ii Procedures

By mid-April
Begin all planning and preparations for nominee solicitation. This will include discussion and preparation of promotional materials, printing of materials, package preparation, delivery method and preparation, etc. All necessary criteria for nomination will be identified in these materials along with submission deadline, which shall be no later than June 15 each year in which funds are available.

By mid-May
One package of materials will be sent to the Director of Scholarships and/or Financial Aid in the case of postsecondary members and to the voting member in the case of non-postsecondary members.

By mid-June
Nomination period is closed and scholarship recipients are selected from the pool of submissions. Those demonstrating an interest in the financial aid profession shall be given first preference. Other submission criteria may be utilized to prioritize this pool and/or the remaining nominees if there are inadequate funds to award to all those who meet the preferred nomination and/or there are funds remaining after the preferred pool of nominees has been satisfied. Secondary preference may be given to either GPA or the demonstration of need as determined by the Committee members.

By Late June
Names of selected recipients will be forwarded to the Board of Directors, no later than the annual Transition Meeting. Each recipient shall be notified by mail and each recipient's school shall be copied. Each school shall be contacted to determine when funds should be disbursed to the school on behalf of the recipient. The Treasurer shall be provided with a list of recipients to disburse funds along with these dates. Finally, records of all transactions and letters shall be forwarded to the Archives Committee.

4.3.2.c John Medley Financial Aid Advocacy Award

4.3.2.c.i Purpose
To recognize a member of the financial aid community who has demonstrated student advocacy and is presently working to provide students with opportunities for education through the financial aid process.

This award was renamed the John Medley Financial Aid Advocacy Award in March 2000, in recognition of our dear friend and colleague who demonstrated enthusiasm and never ending support for the students we serve at every opportunity.

4.3.2.c.ii Procedures

By mid-January
Begin all planning and preparations for nominee solicitation. This will include discussion and preparation of promotional materials, printing of materials, package preparation, delivery method and preparation, etc. All necessary criteria for nomination will be identified in these materials along with submission deadline which shall be no later than May 15 each year.

**Spring Conference Handout**

An announcement will be placed in the edition of the AASFAA Advocate immediately prior to nominee submission deadline notifying all members of their ability to nominate a member and, a targeted mailing will go to each Board Member and Committee Chair, requesting their participation by providing a nomination.

Nomination forms must include a one (1) paragraph prospectus on the nominee and the member's reasons for placing the nomination.

**By mid-May Nomination period is closed.**

The Committee shall review all nominated candidates to ensure all necessary information was submitted and select three (3) nominees to present at the next Board of Directors meeting (likely to be the Annual Transition Meeting), in priority order, for the Board's determination of a final recipient.

4.3.2.c.iii  **John Medley Financial Aid Advocacy Award Recipients**

A list of recipients can be found in Section 1 of this manual.

4.3.2.d  **Robert Thompson Memorial Leadership Award**

4.3.2.d.i  **Purpose**

The Robert Thompson Memorial Leadership Award was established in 1985 to honor a friend, colleague and mentor of the Association. This award is given to a member of the Association who has best demonstrated, during the member’s financial aid career, leadership qualities such as training and mentoring other association members. These are some of the qualities that typify the standards set by Robert Thompson.

To place a member's name in nomination, the nominee must:

1. Be a current Active Member of the Association, as defined in Bylaws; and,
2. Have demonstrated a commitment to the profession versus the association through mentoring training and support of association members over a sustained period of time.

4.3.2.d.ii  **Procedures**

By January Notices in 2/1 and 5/1 Advocate

Begin all planning and preparations for nominee solicitation. This will include discussion and preparation of promotional materials, printing of materials, package preparation, delivery method and preparation, etc. All necessary criteria for nomination will be identified in these materials along with submission deadline, which shall be no later than May 15 each year.

By March

An announcement will be: 1) placed in the edition of the AASFAA Advocate; 2) made at the Spring Conference and immediately prior to nominee submission deadline notifying all members of their ability to nominate a
Member and, a targeted mailing will go out in the 5/1 Advocate to each voting member requesting their participation by providing a nomination.

Nomination forms must include a one (1) paragraph prospectus on the nominee and the member's reasons for the nomination.

By mid-May Nomination period is closed.

The Committee shall review all nominated candidates to ensure all necessary information was submitted and select three (3) nominees to present at the next Board of Director's meeting (likely to be the Annual Transition Meeting), in priority order, for the Board's determination of a final recipient.

4.3.2.d.iii Robert Thompson Memorial Leadership Award Recipients

A list of recipients can be found in Section 1 of this manual.

4.3.2.e  WASFAA Conference Scholarships

4.3.2.e.i  Purpose

To provide the opportunity for two (2) members of the Association, at least one being a member of minority affiliation, with less than four (4) years of financial aid experience, to attend the WASFAA Conference at AASFAA's expense.

4.3.2.e.ii  Procedures

By mid-January

Begin all planning and preparations for nominee solicitation. This will include discussion and preparation or promotional materials, printing of materials, package preparation, delivery method and preparation, etc. All necessary criteria for nomination will be identified in these materials along with submission deadline, which shall be no later than March 15 each year.

Early February

The scholarship nomination packet will go out to each individual listed in the membership directory via Newsletter. The packets shall include all criteria to be eligible to receive the scholarship. Each nomination form must include an area for the voting member to approve the nomination thereby indicating the institution's approval of the nominee's ability to attend the Conference's should they be selected.

Early March Nomination period is closed.

The Committee shall review all nominated candidates to ensure all necessary information was submitted and select a recipient to attend the Conference.

By mid-March

The recipients and their schools shall be notified and the Conference Registration Forms shall be completed and submitted to the Treasurer for remittance of payment. Room reservations shall be made, if necessary, and appropriate travel arrangements shall be confirmed. The Treasurer shall be advised of all required dispensations of money and reimbursement requirements.

4.3.2.e.iii  WASFAA Conference Scholarships Recipients

1991  Hellen Baker, Mesa Community College
      Nancy Long, Central Arizona College
1992  No recipients—No applications received
1993  Orlando Valenzuela, The University of Arizona
1995  Bobbie Barciz, Collins College
      Janice McClain, Gateway Comm. College
      Stanley Kinard, Mesa Community College
1996  Connie Cragg, The American Institute
      Rose Jenkins, Northern Arizona University
1997  Terri Eckel, Northern Arizona University
      Stephanie Foster, Carsten Institute
1998  Heather Miller, The University of Arizona
       Inez Moreno-Weinert, ASU West

1999  Jill Robertson, Northern Arizona University
       Bill Barquin, Grand Canyon University

2000  Jamie Poleviyuma, Hopi Tribe Grants & Scholarships
       Marilee Sullivan, Grand Canyon University

2001  Shirley Vaden, Prescott College
       Beverly Stallman, Arizona Western College

2002  Marilynn Singleton, Arizona State Univ.
       Gerry Covert, Eastern Arizona College

2003  Virginia Callahan, The University of Arizona
       Terri Eckel, Northern Arizona University
       Howard Fisher, Ottawa University
       Joni Grover, Mesa Community College
       Pete Leonard, Southwestern College
       Greg Mason, Central Arizona College
       Melba Moore, International Institute of the Americas
       Sheryl Robinson, Embry Riddle
       Shirley Vaden, Prescott College

2004  Luis Barajias, Arizona Western Community College
       Yolanda Bon, Glendale Community College
       Paula Cady, The Art Institute of Phoenix
       Regina Ceo, Gateway Community College
       Julio Durazo, Pima Community College
       Abigail Garcia, The Art Institute of Phoenix
       Anne Hatcher, Glendale Community College
       Bradley Honious, Gateway Community College
       Cheryl Kibarian, Thunderbird The Garvin School of International Management
       Shelley LaMoure, Ottawa University
       Michele Leon, International Academy of Hair
       Sharon Montoya, Eastern Arizona Community College
       Norma Navarro-Castellanos, The University of Arizona
       Natalie O’Connor, Midwestern University
       Omar Perez, Mesa Community College
       Laura Richman, Ottawa University
       Cameron Robb, The Art Institute of Phoenix
       Laurie Robbins, ITT Technical Institute
       Adrienne Sapper, Mesa Community College
       Beverly Stallman, Arizona Western Community College
       Leticia Villasenor, The University of Arizona
       Vita Allison, Northern Arizona University

2005  Edgardo Cornejo, Pima Community College
       Grace Nakaidinae, Dine’ College
       Jennifer Frey, Northern Arizona University
       Ellen Neel, Glendale Community College
       Gerry Covert, Eastern Arizona College

2006  Karen Owens, Ottawa University
       Omar Perez, Mesa Community College
       Mary Ilosvay, Lamson College

2007  Ed Swierkos, Arizona Western College
       Linda Barker, Northern Arizona University
       Katharine Baggett, University of Arizona

2008  No recipient
2009  No recipient
2010  No recipient
2011  No recipient
2012  No recipient
4.3.2.f WASFAA Summer Institute Scholarship

4.3.2.f.i Purpose

To provide the opportunity for a member(s) of the Association, with less than four (4) years of financial aid experience, to attend the WASFAA Summer Institute at AASFAA's expense.

4.3.2.f.ii Procedures

Mid-January
Begin all planning and preparations for nominee solicitation. This will include discussion and preparation of promotional materials, printing of materials, package preparation, delivery method and preparation, etc. All necessary criteria for nomination will be identified in these materials along with submission deadline, which shall be no later than April 15 each year.

Mid-February
The scholarship nomination packet will go out to each individual listed in the membership directory via Newsletter. The packets shall include all criteria to be eligible to receive the scholarship. Each nomination form must include an area for the Voting Member to approve the nomination thereby indicating the institution's approval of the nominee's ability to attend the Institute should they be selected.

Early/Mid-March Nomination period is closed.
The Committee shall review all nominated candidates to ensure all necessary information was submitted and select a recipient to attend the Summer Institute.

By Mid/Late March
The recipient and their school shall be notified and the Institute Registration Form shall be completed and submitted to the Treasurer for remittance of payment. Room reservations shall be made if necessary, and appropriate travel arrangements shall be confirmed. The Treasurer shall be advised of all required dispensations of money and reimbursement requirements.

4.3.2.f.iii Summer Institute Scholarship Recipients

1986 Ann Krispin, Universal Technical Institute
1988 Jean M VanNierop, Mohave Community College
1990 Greg Ramirez, Northern Arizona University
1993 Terri Sandoval, Rio Salado Community College
1995 Sheri Doerksen, Southwestern College
1996 Christy Gregory, Conservatory of Record Arts and Sciences
1997 Sharon Montoya, Eastern Arizona College
1998 Shirley Vaden, Prescott College
2000 Judy Haskell, Northern Arizona University
   Jennifer Janda, Collins College
2001 Iliand Garcia, Arizona State University
   Pete Leonard, Southwestern College
2002 Susan Young, University of Adv Comp Tech
   Kathaerine Ann Johnson, Arizona State University
   Katie Shock, Eastern Arizona College
   Katherine Proctor, Northern Arizona University
4.3.2.g  WASFAA Jerry R. Sims Management & Leadership Institute Scholarship

4.3.2.g.i  Purpose
To provide the opportunity for a member(s) of the Association, with at least four (4) calendar years of full-time financial aid office experience, to attend the WASFAA Jerry R. Sims Management & Leadership Institute at AASFAA’s expense.

4.3.2.g.ii  Procedures
Mid-January
Begin all planning and preparations for nominee solicitation. This will include discussion and preparation of promotional materials, printing of materials, package preparation, delivery method and preparation, etc. All necessary criteria for nomination will be identified in these materials along with submission deadline, which shall be no later than April 15 each year.

Mid-February
The scholarship nomination packet will go out to each individual listed in the membership directory via Newsletter. The packets shall include all criteria to be eligible to receive the scholarship. Each nomination form must include an area for the Voting Member to approve the nomination thereby indicating the institution’s approval of the nominee’s ability to attend the Institute should they be selected.

Early/Mid-March Nomination period is closed.
The Committee shall review all nominated candidates to ensure all necessary information was submitted and select a recipient to attend the Summer Institute.
By Mid/Late March
The recipient and their school shall be notified and the Institute Registration Form shall be completed and submitted to the Treasurer for remittance of payment. Room reservations shall be made if necessary, and appropriate travel arrangements shall be confirmed. The Treasurer shall be advised of all required dispensations of money and reimbursement requirements.

4.3.2.g.iii Management & Leadership Institute Scholarship Recipients

2003 Cheryl Kibarian, Thunderbird-American Graduate School
Virginia Callahan, The University of Arizona

2004 Jennifer Frey, Northern Arizona University
Yolanda Bon, Glendale Community College

2005 Dorena Spitler, The Art Institute of Phoenix
Kenneth Clarke, Paradise Valley Community College
Nancy Killian, The University of Arizona

2006 Terri Eckel, Prescott College

2007 Kathryn Martin, University of Arizona

2008

2009

2010

2011

2012

2013

2014

2015

2016

2017

4.3.2.h AASFAA Conference Scholarships

4.3.2.h.i Purpose

To provide the opportunity for a minimum of two (2) members of the Association per conference, with at least one (1) calendar year of full-time financial aid office experience to attend an AASFAA Conference at AASFAA's expense.
To place a member's name in nomination, the nominee must:

1. Be a current Active Member of the Association, as defined in the Bylaws; and,
2. Be employed at a postsecondary institution; and,
3. Must not have attended more than one AASFAA conference in the last two years.

4.3.2.h.ii Procedures

Summer and Late Fall

Begin all planning and preparations for nominee solicitation. This will include discussion and preparation of promotional materials, printing of materials, package preparation, delivery method and preparation, etc. All necessary criteria for nomination will be identified in these materials along with submission deadline, which should be no later than September 20 and January 31 each year, respective to each conference.

August/Early January

The scholarship nomination packet will go out to each individual listed in the membership directory via Newsletter or the conference teaser. The packets shall include all criteria to be eligible to receive the scholarship. Each nomination form must include an area for the Voting Member to approve the nomination thereby indicating the institution's approval of the nominee's ability to attend the Conference should they be selected.

Late Sept & Jan Nomination period is closed.

The Committee shall review all nominated candidates to ensure all necessary information was submitted and select two (2) recipients to attend the Conference through random selection.

By Early October / Mid-February

The recipients and their schools shall be notified and the Conference Registration Forms shall be completed and submitted to the Treasurer for remittance of payment. Room reservations shall be made as necessary. The Treasurer shall be advised of all required dispensations of money and reimbursement requirements.

Scholarship award recipients will be assigned a 'host' from the Awards and Scholarships Committee who will make the necessary arrangements with the recipient and AASFAA to manage conference registration, hotel accommodations, the relevant payments for each, and coordinating transportation to and from the conference. Additionally, they will act as a 'mentor' or guide at the conference as needed.

Scholarship award recipients will be responsible for attending the conference business meeting (for purposes of introduction/recognition) and assisting at the registration table (to meet the membership prior to the beginning of the conference.)
4.3.2.h.iii  AASFAA Conference Scholarships Recipients

Spring 1997  Kay Dotson, Collins College
            Cheryl Kibarian, Thunderbird, AGSIM

Spring 1999  Miranda Hildebrand, Grand Canyon University

Fall 1999    Amy Jo Carey, The University of Arizona
            Paula Glasser, Grand Canyon University

Spring 2000  Jill Kang, University of Adv Comp Tech
            Miguel A Muscoso, The University of Arizona

Fall 2000    Denise Bencenti, Navajo Nation FA & Scholarship
            Skye Long Bailey, Glendale Community College
            Gloria Candelaria, The University of Arizona
            Christy Chilton, Cons of Record Arts & Sciences

Spring 2001  Rebecca Rhodes, Grand Canyon University
            Nathaniel Numkena, Hopi Tribe Grant & Scholarship
            Sharon Montoya, Eastern Arizona College
            Lucy Sida, Pima Community College

Fall 2001    Donna Metzger, Thunderbird, AGSIM
            Cindy Barnes, Eastern Arizona College
            Barbara Harrington, Eastern Arizona College
            Edgardo Cornejo, The University of Arizona
            Joi Grace, Northern Arizona University
            Judy Haskell, Northern Arizona University

Spring 2002  Dawn Biles, Pima Medical Institute
            Suzanne Ringle, Gateway Community College
            Annemarie Valdez, Grand Canyon University
            Eva Batista, The University of Arizona
            Judith Kempf, The University of Arizona

Fall 2002    Brenda Burns, Yavapai College
            Kelley Stoneberger, Northern Arizona University
            Julie Weiner, The University of Arizona

Spring 2003  Jacqueline Fierro, Grand Canyon University
            Stephanie Jones, Collins College
            Inez Moreno-Weinert, South Mountain Community College
            Victoria Rupel, The University of Arizona

Fall 2003    Lambert Cruz, Southwestern College
            Robert Folger, Northern Arizona University
            Troy Hofheins, Glendale Community College
            Nancy Killian, The University of Arizona
            Sharron Perry, Prescott College

Spring 2004  Sponsoring WASFAA in May 2004 so will use funds for
            WASFAA scholarships.

Fall 2004    Stacie Young, The Art Institute of Phoenix
            Rick Gordon, Carsten Institute
            Dalmira Perez, Pima Community College
            Karla Gonzalez, Mesa Community College
            Kassandra Mullan, Glendale Community College
            Anne Hatcher, Glendale Community College
            Amber Spencer, Northern Arizona University
            Cece Alday, The University of Arizona
            Paul Gonzales, Estrella Mountain Community College

Spring 2005  Joseph McArthur, Northcentral University
            Theresa Toscano, Mesa Community College
            Deborah Coulter-Smith, International Institute of the Americas
            Andy Lahman, The Art Institute of Phoenix
            Linda Nilssen, Midwestern University

Michael Bracken, Arizona Automotive Institute
Anthony Morrone, Prescott College

Fall 2005
Jennifer McLaurin, Central Arizona College
Nancy Taylor, Mohave Community College
Sonia Terraza, Pima Community College
Joy Miller, The University of Arizona
Roland Thenot, Lamson College
Alex Muro, Prescott College

Spring 2006
Jennifer Freyermuth, Central Arizona College
Jackie James, ITT Technical Institute

Fall 2006
Lorrie Hough, The University of Arizona
Christopher Morris, Prescott College
Samantha Seago, Collins College
Dave Weems, Grand Canyon University
William Chandler, Gateway Community College
Suzanne Lasich, Arizona Western College

Spring 2007
Shelley Semler, The University of Arizona
Mykle Grant, Pima Community College
Ed Swierkos, Arizona Western College
Amber Krier, Collins College

Fall 2007
Brenda Wright, Thunderbird School of Global Business
Katie Borjon, University of Arizona
Kelly Walker, W.P. Carey School of Business at AZ State University
Krystine "K" Grace, Conservatory of Recording Arts
Carolina Ramirez, AZ Western College
Anne Hatcher, Glendale Community College

Fall 2008
Nancy Killian, The Art Institute of Tucson
Amanda Bowen, Northern Arizona University
Kristin Wilde, Collins College
Emily Nordstrom, University of Arizona
Kelley Snead, Arizona Western College

2009
2010
2011
2012
2013
2014
2015
2016
Tiffany Reed, Prescott College
Caleb Williams, Northern Arizona University

2017
2018
4.3.2.i. Federal Student Aid Conference Scholarship

4.3.2.i.i Purpose

To provide the opportunity for a member(s) of the Association to attend the Federal Student Aid Conference (formerly known as the Electronic Access Conference, EAC) at AASFAA’s expense. The Scholarship is a reimbursement award up to $750 to cover documented travel (coach airfare) and lodging expenses at the conference or overflow hotel including all applicable taxes. Receipts for all expenses along with a completed expense report should be forwarded to the chair(s) of the Awards and Scholarship committee for processing, which will not be processed until AASFAA newsletter article is received.

4.3.2.i.ii Procedures

Summer

Begin all planning and preparations for nominee solicitation. This will include discussion and preparation of promotional materials, printing of materials, package preparation, delivery method and preparation, etc. All necessary criteria for nomination will be identified in these materials along with submission deadline, which should be no later May 31 each year.

July

The scholarship nomination packet will be posted to AASFAA website and distributed via the listserv to all active members. The packets shall include all criteria to be eligible to receive the scholarship. Each nomination form must include an area for the Voting Member to approve the nomination thereby indicating the institution's approval of the nominee's ability to attend the Conference should they be selected.

Beginning September Nomination period is closed.
The Committee shall review all nominated candidates to ensure all necessary information was submitted and select recipient(s) to attend the Conference in Las Vegas, NV.

Late September

The recipient(s) and their school(s) shall be notified and the Conference Registration Forms shall be completed and submitted to the Treasurer for remittance of payment. Room reservations shall be the responsibility of the recipient(s). The Treasurer shall be advised of all required dispensations of money and reimbursement requirements.

Scholarship award recipients will be responsible for writing a short article (a couple of paragraphs) about their experience at the FSAC to be included in the AASFAA newsletter that should be emailed to chair(s) of Awards and Scholarship committee. Reimbursement request will not be processed until article has been received.

4.3.2.i.iii Federal Student Aid Conference Scholarship Recipients

2006 Brenda Wright, Thunderbird, AGSIM
Judith Smith, The University of Arizona
Nadine Waldrop, American Indian College
George West, Coconino Community College
4.3.2.j. NASFAA Conference Scholarship

To place a member’s name in nomination, the nominee must:

1. Be employed at a postsecondary institution that is a current member of AASFAA;
2. Have served on an AASFAA committee in the current year;
3. Not have attended a NASFAA conference within the last five years;
4. Have at least four years of financial aid office experience; and,
5. Permission from his or her supervisor to attend the conference.

4.3.2.k AASFAA Association Leadership Award

4.3.2.k.i. Purpose

The AASFAA Association Leadership Award was established in 2000 to recognize and honor an Association colleague. This award is given annually to a member of the Association who has best demonstrated, during a sustained period of time, leadership and direction to the Association as well as contribution to its activities, either behind the scenes or in the forefront.

To place a member’s name in nomination, the nominee must:

1. Be a current Active Member of the Association, as defined in the Bylaws;
2. Have demonstrated a long participation in the Association (i.e. committee participation, conference participation, officer, involved in training and/or other special projects of the Association);
3. Have supported the goals and objectives of AASFAA; and,
4. Have inspired and encouraged others to participate actively in professional development activities.

4.3.2.l Preparation of Certificates and Plaques

4.3.2.l.i. Certificates

Prior to the end of Board transition each year, the Committee should request, if not previously submitted, a listing from each Committee Chair/Co-Chair of the members on their specific Committee. The submitter will ensure names are all spelled correctly and will include the Chair/Co-Chair. The Awards and Scholarships Committee will prepare certificates for each Committee member and turn the completed certificates over to the President for signature and delivery at the annual Fall Conference.

4.3.2.l.ii. Plaques

At the request of the Board, this Committee shall obtain plaques as indicated. Plaques are awarded for both the Robert Thompson Memorial Leadership and the John Medley Financial Aid Advocacy Awards (if one is named). A gavel is also ordered for the President Elect at this time and retained by the sitting President to be delivered at the annual Transition Meeting.
provider of plaque will be at the discretion of the Awards and Scholarship Committee.

4.3.3 Conference Committee

4.3.3.a Function

Plan, organize, direct, control, and evaluate any conference or meeting that they are directed to facilitate by the Executive Board and supported by the Association, keeping in mind the different member sectors and pertinent issues of the times.

4.3.3.b Agenda Approval

The Board of Directors shall retain the authority to provide final approval of agendas for each Conference Committee coordinated event. The Chair/Co-Chair of the Conference Committee shall ensure a proposed final agenda is provided to the Board on the schedule indicated in the time line below so adequate ability for Board consideration is possible.

4.3.3.c Alcohol

The Conference Committee Chair is authorized, at their discretion with Board of Directors approval, to include alcoholic beverages at meals and/or receptions which are part of a sponsored or sanctioned event in conjunction with either of the semi-annual conferences or the annual Transition Meeting.

4.3.3.d Evaluation Forms

Evaluation forms shall be prepared and analyzed for each session and the event as a whole. Information may be collected as the Committee deems appropriate using guidance from prior year forms. Information from the evaluations will be cumulated and reported to the Board at the next established meeting and utilized by the Committee to develop and improve future events.

4.3.3.e Event Responsibilities

Facilitate all issues revolving around conference, round table, workshop, etc., dates and sites as established by the Board of Directors and in coordination with other Committees as required under the time table below. The bars on the timetable are a range within which identified activities should occur. The bars do not preclude you from initiating appropriate activities sooner, however, the end of each bar is the latest time frame within which any of the activities will be completed.

4.3.3.f Negotiation and Payment of Conference Committee Activity

The Chair/Co-Chair, in conjunction with the Treasurer shall negotiate final payment of all incurred expenses related to activities under their purview with the appropriate representative of the site. This shall include adjustment of billing for services not rendered or substandard by the mutual determination of the Chair/Co-Chair and Treasurer.

4.3.3g Pre-Event Teasers

Each teaser shall include the following at the minimum: event site, event dates, thematic information, room-booking deadlines (if applicable), and reservations information. Each teaser is mailed to every individual listed in the Membership Directory and other associated groups in the State as determined appropriate by the Committee.
4.3.3.h Pre-Registration Materials

Pre-Registration materials shall include, but are not limited to, demographic information requests, meal limitation requests, deadlines for registering to avoid fees, hotel booking information, current completed agenda, fee/payment information, and contact information for both registration material (to the Treasurer) and Conference Committee.

4.3.3.i Registration Packets

Registration packet materials shall include, but are not limited to, complete agenda/room location information, sponsorship information, complete attendee listing as of 14 days prior to event, name tags, conference (and session if appropriate) evaluation forms, business meetings minutes, and the Treasurer's report.

4.3.3.j Required Membership

Required membership of this committee shall include the Site Selection Chair.

4.3.3.k Other Responsibilities

1. Review and be familiar with conference contracts;
2. Develop creative approaches to meet professional development needs of membership at conferences;
3. Coordinate with the Membership Training and Site Selection/Coordination committees to collaborate on issues relating to training and site.
CONFERENCE COMMITTEE EVENT TIME LINE

<table>
<thead>
<tr>
<th>Prior</th>
<th>Conf. 90Days</th>
<th>70Days</th>
<th>60Days</th>
<th>45Days</th>
<th>30Days</th>
<th>14Days</th>
<th>Event Occurs</th>
</tr>
</thead>
<tbody>
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<td>Meet. Prior</td>
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</tbody>
</table>

**Research Before First Committee Mtg:**
Meet W/Last Year’s Conference Chair /Co-Chair
Meet With Site Selection Chair /Co-Chair
Request Additional Info From Site
Contact (i.e. maps, floor plans, menus, AV equipment, special costs)

**Initial Conference Tasks:**
Select a Theme
Select Topics
Prepare Agenda/Obtain Board Approval
Select/Contact Speakers
Select Meals
Plan Special Events/Social Activities
Schedule/Assign Tasks (See Below)

**Subsequent Tasks:**
Send out Teaser
Confirmation Letters to Presenters
Finalize Social Events
Finalize Contests (if applicable)
Finalize Auctions (if applicable)
Negotiate /Sign Contracts
Determine Audio Visual Needs
Determine Room Set-Up Plans

**Send Final Agenda to FP&D Chair**

**Send Pre-Registration Materials:**
(1 per member institution):

**Conference Registration Preparation:**
Name Tags
Evaluations
Registration Packets
Signs

**Provide Final Meal Counts to Hotel**

**Remit Payment on All Billings**

**Potential Tasks for Consideration:**

- Publications and Correspondence
- Pre-Registration Materials
- Registration Materials
- Evaluation Forms (session, general)
- Theme(s)
- Letters to Presenters (follow-up, thanks)
- Mailing Lists (member, non-member, etc.)
- Newsletter Articles
- Session/Agenda
- Topics
- Keynote Speaker
- Scheduling
- Contacting Presenters
- Equipment Needs
- Room set-up, Hosting presenters

- Registration Coordination
- Liaison with Treasurer
- Liaison with FP&D
- Vendor Relations
- Accounting/Budgeting
- Finance Coordination
- Site Arrangements
- Site Contracts
- Complimentary Rooms
- Floor Plans
- Meals (Menus, Costs)
- Guest Room Accommodations
4.3.4 Fiscal Planning and Development

4.3.4.a Function

Develop proposed annual budget for Board of Directors approval and be the focal point for all fund raising/revenue-generating programs for both billing and promotional efforts within AASFAA.

4.3.4.b Advancement of Tax Exempt Status

Ensure that each sponsor/vendor is provided with documentation verifying AASFAA's tax exempt, non-profit status for the tax preparation/purposes of said sponsor/vendor. Such documentation shall include the amount of funding/support expended by each sponsor/vendor. For more information refer to Appendix F.

4.3.4.c Budget Recommendation Preparation

This Committee shall facilitate the completion and collection of budget and revenue request forms from each Committee Chair/Co-Chair immediately after the transition of each Board and utilizing the forms provided in the Appendix.

The Committee shall cumulate, review and make recommendations upon the requests in a format which will allow the Board to consider both the Committees’ requests along with Fiscal Planning and Development recommendations.

This process will be completed and be prepared for Board approval no later than July 1 of each year. The Chair/Co-Chair shall attend the Board of Directors meeting established to formulate the budget.

Within 14 days after receiving the Board's directives, the Committee shall prepare the final documentation of the budget based upon these directives and forward a copy to each Board member and each Committee Chair for their specific committee budget detail.

4.3.4.d Coordination of Sponsorship Opportunities

By the end of each July, the Committee will have submitted a listing of all potential and anticipated sponsorship and vending opportunities to the vending list available through the Membership Committee. This listing shall include fees for each sponsorship level, and requirements (i.e. camera ready copy, deadlines, etc.), and procedures for specific items (i.e. ads or activities) in sponsorship packages. At a minimum this listing shall include information on event sponsorship policies, newsletter ad information, Membership Directory ad information, AASFAA web site sponsor recognition (including banner ads), and any other opportunities the Chair/Co-Chair may be aware of that will be available as part of sponsorship packages at the time of distribution of this material.

Notice of sponsorship opportunities will be made by email to sponsor contacts. The email will include a deadline for sponsors’ responses and instructions for completion of the AASFAA Online Sponsorship Form.

The Committee will further develop non-traditional fundraising opportunities due to AASFAA’s tax-exempt status. This includes other sponsorship and vending opportunities that become available throughout the fiscal year and are not included in the sponsorship packet. These will be handled in a fair and equitable manner, coordinated by the Fiscal Planning and Development Committee.
4.3.4.e Partial Year Sponsorship

An organization that wishes to become an Association sponsor after the initial sponsorship solicitation will be assessed the fee for a total year’s sponsorship. The Association is not responsible for refunding fees for any unused benefit retroactive to the date an organization submitted the Online Sponsorship Form.

4.3.4.f Coordination with Treasurer

Additionally, this Committee shall centralize all revenue generating activities, and along with the Treasurer and Treasurer Elect of the Association will receive notice of all sponsorship submissions.

Direct remittance of sponsorship payments will be made to the Treasurer Elect of the Association. The Committee will be responsible for verifying with the Treasurer Elect that sponsor payments have been made before sponsors can take advantage of sponsorship benefits such as advertisements or conference vending.

4.3.4.g Membership Dues

Membership dues, in the amount of $75.00 per membership, shall be tracked for documentation of income purposes only by Fiscal Planning and Development. (Actual collection of membership dues are made in coordination with the Membership Committee each fiscal year. Payment remittance shall be directed to the Treasurer Elect of the Association. There are no prorated membership dues for becoming a member later in the year, the fee would still be $75.00).

4.3.4.h Facilitation of Advertisement and Logo Collection

The Committee will be responsible for contacting all sponsors regarding the submission of advertisements for the newsletter and Membership Directory, including the size and format of ads, to whom they should be submitted, and the deadlines for submission.

The Committee is also responsible for coordination with the Conference Committee and the Information and Technology Committee by collecting sponsor logos for the Conference Program, Conference Recognition signs, and AASFAA web pages, and by displaying signs for the sponsors of conference events as designated in the various sponsorship packages.

4.3.4.i External Fund Raising

All other fund raising/revenue generating activities shall be coordinated through this committee and shall be completed, to the extent possible, at least 30 days prior to the deadline established by the committee who will be impacted by the fund raising.

4.3.4.j Sponsorship Policy

This Committee shall ensure the maintenance of the Vendor Policy as stated in Section 3.10 of this Manual.

4.3.4.k Mandatory Membership

In addition to the requirement of Section 4.3.8.c of this Manual, the membership of this Committee will include the Treasurer and Treasurer Elect.
4.3.5 Diversity

4.3.5.a Function

Identify and develop an understanding of diversity issues which will/should impact Association activities, and determine the best ways to disseminate that knowledge/information to the association. Groups include, but are not limited to the following: cultural, gender, age, color, race, and sexual preference.

4.3.5.b Development Coordination

Identify to the Chair/Co-Chair of the Conference Committee with topics regarding diversity issues and/or presentations which may, at the committees’ discretion, be appropriately addressed at various Association functions in an effort to enhance attendee appreciation of said issues.

4.3.5.c Strategy Development/Dissemination

Identify methods to effectively manage issues related to diversity and disseminate this information, and their origins, to the Membership for their utilization.

4.3.5.d Encourage and Promote

Each member of the Committee shall directly pursue candidates they identified as qualified and capable to place their names in nomination for AASFAA and WASFAA offices.

4.3.5.e Duties

Work directly with other AASFAA committees, providing input on the impact of financial aid issues for a diverse population of students.

Develop and maintain effective communication links between AASFAA and its diverse population of members.

Be available to high school counselors, community educators, admissions officers, parents, students, as well as others, as needed, on matters of serving the state's diverse and multi-cultural populations and communicating their concerns to the Association.

Develop a liaison relationship between AASFAA and the WASFAA Ethnic Diversity Committee. (The AASFAA chair may be asked to sit on the WASFAA committee).

Encourage members of all groups to participate in AASFAA committees and to run for an AASFAA office.

4.3.6 Newsletter

4.3.6.a Function

Produce an Association on-line newsletter updating members on committee and task force activities, conference activities, and regulatory information as appropriate. Further, pursue articles from Board members, Committee Chairs, the membership, affiliated agencies and from regional and national association liaisons and other appropriate items of interest.
4.3.6.b Advertising

The Editor shall provide the Chair/Co-Chair of the Fiscal Planning and Development Committee with the publication schedule (4.3.6.g) and all promotions regarding advertising shall be facilitated by the Fiscal Planning and Development Committee. The Fiscal Planning and Development Committee Chair/Co-Chair shall provide the Editor with a list of advertisers that have paid to submit an ad in the pending newsletter. The editor shall request, from those advertisers, all camera-ready artwork no less than thirty (30) days prior to each publication date for inclusion in the pending issue. The Chair/Co-Chair shall assist the Fiscal Planning and Development Chair/Co-Chair with advertising efforts as requested.

4.3.6.c On-line publication

Newsletters shall be published in a digital format to be made available to the membership on-line at www.aasfaa.org.

4.3.6.d Editorial Review Policy

Each issue of the AASFAA Advocate will be reviewed and approved prior to final production by the current Newsletter Committee Board Liaison and the current AASFAA President.

4.3.6.e Format

Newsletter format should be maintained and produced utilizing a publishing software package compatible with the on-line requirements. The President's message should be printed on the front cover along with a table of contents if so desired. No other material should be produced on the cover with the exception of a listing of the current Board of Directors and their contact information. The publisher's box is to be located on the second page. Advertisements and articles are arranged throughout the publication at the discretion of the Committee.

4.3.6.f Mandatory Inclusions

Each issue of the AASFAA Advocate must include the Editorial Policy as well as advertising information and Newsletter Committee Membership listing along with assignments (if applicable).

4.3.6.g Publication Schedule

Date for each newsletter to be available on-line shall be no later than the following:

<table>
<thead>
<tr>
<th>Issue On-line</th>
<th>Fall 1</th>
<th>Spring 1</th>
</tr>
</thead>
</table>

Be certain to advise each Board Member and Committee Chair/Co-Chair of these dates as they are required to have reports (and/or additional time sensitive information) submitted no later than thirty (30) days prior to these dates.

Once the newsletter has been published online, the chair/co-chair shall send an email to the AASFAA listserv notifying the membership that the newsletter is online and available for viewing at www.aasfaa.org.

4.3.7 Nominations and Elections
4.3.7.a Function

Administer the nominations and election process to ensure that the Association is managed by qualified financial aid personnel.

4.3.7.b Encourage and Promote

Each member of the Committee shall directly pursue candidates they identified as qualified and capable to place their names in nomination for AASFAA and WASFAA offices.

4.3.7.c Mandatory Membership

The membership of this Committee shall include at least the Past President (required Chair), President Elect and President.

4.3.7.d Notification of Membership

This Committee shall ensure that each individual member identified is an eligible member to participate, and is kept apprised of the process according to the following schedule:

i. By February 1st
   Each member determined eligible shall be solicited for nominations through the most appropriate and timely avenue possible (Newsletter or email). This notification shall include descriptions of each office for which nomination(s) are being solicited, the qualifications to be nominated for each office, and appropriate deadlines.

ii. By March 15th
    Nomination solicitation is closed and the board approves nominations.

iii. By March 20th
     Ballots need to be distributed to the membership.

iv. By April 15th
    Election results are delivered to the membership.

4.3.8 Site Selection

4.3.8.a Function

Examine, recommend and prepare detail for the Board's consideration for conference sites capable of handling the needs of AASFAA within each selected host area. Site Selection Chair shall serve as a member of the Conference Committee as Site Coordinator.

4.3.8.b Contract Negotiation

In conjunction with the Chair/Co-Chair of the Conference Committee, the Chair/Co-Chair of this Committee will negotiate the best possible contract with each Board approved site to obtain the most favorable financial arrangements for the Association and its membership. This will include, but is not limited to, per night room expense, meals expense, number of complimentary rooms, meeting room bookings, gratuity levels, vendor room, etc. Vice President will act as signing authority for all final contract negotiations.

4.3.8.c Required Participation
The Chair/Co-Chair of this Committee is a required member of the Conference Committee and shall provide direction on all issues regarding facilities. Further, ensure all meeting needs are addressed prior to and during each conference.

4.3.8.d Mandatory Membership

The membership of this committee shall include the Vice President.

4.3.9 Awareness and Outreach

4.3.9.a Function

Develop, maintain and enhance new and existing liaison relationships with external professional organizations and agencies concerned with education.

4.3.9.b External Funds Coordination

Assist the Chair/Co-Chair of Fiscal Planning and Development to implement external (non-sponsor/vendor) funding plans to obtain financial support for AASFAA projects and the financial aid profession, in general, through AASFAA.

4.3.9.c Liaison Responsibilities

The Committee shall coordinate and act as liaison on awareness and outreach activities to the following organizations and other professional, civic and State agencies which may request information pertaining to student financial assistance and/or as directed by the Board of Directors:

- Arizona Commission for Postsecondary Education
- Department of Economic Security
- Arizona High School/College Relations Council
- Arizona Association of College Recruitment Officers
- State Post-Secondary Review Entity

4.3.9.d Outreach

Utilize and expand on previously developed mediums to coordinate, through high school counselors, the notification and information of the availability of financial assistance and other funding options to high school students and their parents.

Plan and coordinate other identified activities related to external community outreach in the arena of financial aid awareness.

4.3.10 Membership

4.3.10.a Function

Expand Association's membership and retain current Membership base.

4.3.10.b Collection of Dues

Facilitate with the Treasurer and Treasurer Elect and Information and Technology Chair, the timeline for posting the notice of renewal on the web for collection of annual dues online at www.aasfaa.org.

Provide the Information and Technology Committee and AASFAA webmaster the membership fee amount and the remittance address for the Treasurer or Treasurer Elect. These are included in the invoice that is automatically generated as an e-mail to members upon completion of annual online membership renewal.
Prepare the notice of renewal to be e-mailed to all current members.

Prepare follow up e-mails to current members as well as e-mails to prospective member institutions and make phone calls to encourage renewal of membership before the established directory publication deadline.

4.3.10.c Directory Development/Production Dissemination

Produce the annual Membership Directory for distribution at AASFAA’s Fall Conference. Provide directories to all institutions eligible to receive the directories and facilitate delivery of directories to those who were unable to attend the conference. Coordinate with the Information and Technology Committee to update AASFAA’s online membership directory.

Coordinate with Fiscal Planning and Development to promote advertisement option to potential sponsors/vendors along with ad copy size information, bill remittance information, copy deadline date, etc.

Contact the designated printer to facilitate production and address issues regarding scheduling. Quotes should be obtained by three different printers to ensure the best in quality and price for production of the directory.

Prepare notice to sponsors’ designated contact requesting camera-ready artwork (or format decided upon by the Membership Committee). Notice is to include ad size established for their sponsorship category; logos, if applicable; and deadline for receipt of ad from sponsors. Prepare follow-up notices and make phone calls as needed to collect ads by established deadline.

Establish a timeline to send e-mails and make follow up phone calls to the primary contacts for each paid member institution to encourage them to update institutional and staff information on the website before the established directory publication deadline.

Obtain institutional and individual member reports for paid members from the IT Committee and Webmaster. Use the reports to ensure membership is paid for the current year as updated membership information is prepared and provided to the printer for the directory.

Provide all advertisements and updated member information to the designated printer for initial draft.

Coordinate proofing and final preparations with printer to ensure on schedule to facilitate pick up and delivery of the directories for distribution at the Fall Conference.

Facilitate the delivery of the AASFAA Membership Directory to all member institutions attending the Fall Conference. Preparation includes creating a listing of paid members for tracking purposes; requesting a distribution location from the Conference or Site Committee at or near the conference registration table; and scheduling committee members to help with distribution.

4.3.10.d Membership Promotion

Update and revise the membership application/brochure as appropriately to most effectively solicit new institutional members to the Association.
Disseminate the updated application/brochure to all non-member institutions and agencies involved in the management and/or facilitation of the student assistance programs during the months of July.

4.3.10.e Ombudsman

Each member of the Committee shall act in a capacity of ombudsman at each Association activity at which they are in attendance, to any first time attendee or to any member desiring information or assistance regarding the Association.

4.3.11 Distance Learning

4.3.11.a Function

Identify issues and maintain a comprehensive knowledge of all regulations, statutes and technology associated with distance learning.

4.3.11.b Duties

Identify methods to effectively manage issues relation to Distance Learning and disseminate these techniques to the Membership for their utilization. Provide to Membership Training opportunities associated with distance learning. Update the Board on technology associated with distance learning.

4.3.12 Information and Technology

4.3.12.a Function

Support efficient means of communications and services for the Membership through the use of electronic media.

4.3.12.b Duties

Committee makes recommendations regarding enhanced electronic services and the most effective use of electronic services. Works with other AASFAA committees in an effort to maintain the AASFAA website and ensure that it is a useful means of communication for the Membership. Act as direct liaison with website hosting vendor. Oversight of AASFAA website projects. Maintain the AASFAA listserv.

4.3.13 Membership Training

4.3.13.a Function

Fosters the development and coordination of comprehensive training activities for the Membership. Solicits input from the Membership regarding training needs and ensures that these needs are met.

4.3.13.b Strategy/Development

Coordinates and assists in facilitating training workshops for the Membership.

4.3.13.c Training Locations
The workshops are generally located across the state but special attention should be given to the needs of all regions of the state (south, north, and central) in terms of location.

4.3.13.d Training Facilitators

The committee is responsible for soliciting skilled trainers/presenters to participate in the workshops.

4.3.13.e Evaluation

The committee is responsible for evaluating all training activities so that recommendations can be made to the Board and future training needs can be addressed and met.

4.3.14 Federal and State Legislative Affairs Committee

4.3.14.a Function

Disseminate information to the Membership regarding regulatory issues at both the state and federal level. This committee also serves as a means of educating our state legislators to insure continued and greater access, retention and completion of higher education for students attending postsecondary institutions in Arizona.

4.3.14.b Duties

Communicate with and alert the AASFAA Membership of late and breaking new through the AASFAA listserv.

Develop on-going collaborative relationships with Arizona legislators and their staff.

Work with the Conference Committee or Membership Training Committee to offer sessions relating to regulatory issues.

At the discretion of the Board of Directors, coordinate an event at the Arizona Capitol that would facilitate networking with our state legislators.

4.4 TASK FORCES

Should the Board of Directors establish a Task Force its appointed Chair/Co-Chair and Committee members shall be obligated to the identical policies and procedures as for any other Committee. The President shall prepare a Task Force Assignment Responsibility Form from Appendix E. Each Task Force shall only be empowered during the term of Presidency under which they were appointed.

COMMITTEE/TASK FORCE ASSIGNMENT AND RESPONSIBILITY SHEET

COMMITTEE/TASK FORCE NAME: Policies and Procedures Task Force

YEAR OF ACTIVATION: 1998-99

FUNCTION/PURPOSE: To update on an annual basis the approved Board changes in the Policies and Procedures Manual and make recommendations to the Board for changes.
CHAIR: Vice President

CO-CHAIR (if applicable):

BOARD LIAISON: Vice President

REQUIRED MEMBERSHIP:
Representative-At-Large
President Elect
Secretary

Manual Requirements)

DUTIES: Review minutes from Board Meetings (current and past years) to determine if changes need to be made in the manual.

Obtain information from past and current Board Members and committee chairs to determine if changes need to be made in the manual.

Review with the Board and make changes as directed.

Provide a final copy to the President-Elect prior to the Transition Meeting.

Other duties as directed by the Board of Directors.
COMMITTEE/TASK FORCE ASSIGNMENT AND RESPONSIBILITY SHEET

COMMITTEE/TASK FORCE NAME: Tribal FNA Process

YEAR OF ACTIVATION: 2002/2003

FUNCTION/PURPOSE: Investigate the possibility of AASFAA sponsoring a common electronic FNA that all Arizona tribes, schools and students can utilize. This task force will explore the possibility of AASFAA creating, supporting and hosting a common FNA both electronically on the AASFAA website as well as a paper process. AASFAA will also support the ability for this information to flow between all parties necessary to complete the application. If approved by the AASFAA executive Board, the committee will precede the implementation of this project by piloting it with a smaller population before providing it to all Arizona tribes and schools.

CHAIR:

CO-CHAIR (if applicable):

BOARD LIAISON: President

REQUIRED MEMBERSHIP: Any Tribal or Institutions that works with Native American Students and Tribal Funding regardless of membership in AASFAA.

DUTIES:

Research need for a common electronic application process between tribal agencies and institutions that work with Native American students and Tribal Funding.

Develop the common process to be used by all institutions.

Determine interested institutions (tribal and schools) for pilot program.

Review with the Board and make changes as directed.

Provide final copy and get Board approval.

Implement pilot process for the 2003-2004 academic year. Open process to all tribal agencies and institutions for the 2004-2005 academic year.

Other duties as directed by the Board of Directors.
APPENDIX A

ARIZONA ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS
EXPENSE REIMBURSEMENT FORM

Find the form online at: http://www.aasfaa.org/docs/toc_onlineforms.html
APPENDIX B

20 - 20 OFFICE DESCRIPTION

OFFICE:

TERM:

FUNCTION:

COMMITTEE LIAISON:

CHAIR:

MEMBER ON:

RESPONSIBILITIES:

OTHER ASSIGNED DUTIES:
APPENDIX C

AASFAA COMMITTEE BUDGET REQUEST FORM

Request from Chair of Fiscal Planning and Development Committee
APPENDIX D

AASFAA INCOME/EXPENSE PROJECTION

Request from Chair of Fiscal Planning and Development Committee
## APPENDIX E

**COMMITTEE/TASK FORCE ASSIGNMENT AND RESPONSIBILITY SHEET**

<table>
<thead>
<tr>
<th>COMMITTEE/TASK FORCE NAME:</th>
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<tr>
<td>YEAR OF ACTIVATION:</td>
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<tr>
<td>FUNCTION/PURPOSE:</td>
<td></td>
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</tbody>
</table>

**CHAIR:**

**CO-CHAIR (if applicable):**

**BOARD LIAISON:**

**REQUIRED MEMBERSHIP:**
(beyond Policy and Procedure Manual Requirements)

**DUTIES:**

________________________________________________________________________

________________________________________________________________________
Arizona Association of Student Financial Aid Administrators
Federal Tax I.D. #86-0776710
APPENDIX F

Request form chair of Vendor Relations
## APPENDIX G

### POLICY AND PROCEDURES MANUAL UPDATES

These pages reflect all Board of Directors approved alterations to the Policy and Procedures Manual along with the date each update was voted upon to be incorporated into the Manual.

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<td>03/25/1998</td>
<td>Section 4, Sub-Section 4.2.</td>
<td>Added Policies &amp; Procedures update responsibility to Vice-Presidency</td>
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<td>12/03/1998</td>
<td>Section 2, Article V</td>
<td>Added Treasurer-Elect to Officers</td>
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<td>Section 4, Sub-Section 4.2</td>
<td>Added Treasurer-Elect Office Description</td>
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<tr>
<td></td>
<td>Section 4, Sub-Section 4.2</td>
<td>Added Treasurer-Elect to Treasurer Job Description</td>
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<td>12/03/1999</td>
<td>Section 3, Subsection 3.13</td>
<td>Added Late Fees Policy</td>
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<td>Section 3, Subsection 3.16</td>
<td>Added Refund Policy</td>
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<td>03/08/2000</td>
<td>Section 4, Sub-Section 4.3.7.d.iii.</td>
<td>Added Proxy Statement</td>
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<td>Section 4, Sub-Section 4.3.2.a.</td>
<td>Award renamed to John Medley Financial Aid Advocacy Award</td>
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<tr>
<td></td>
<td>Section 4, Sub-Section 4-3.2.c.</td>
<td>Award renamed to John Medley Financial Aid Advocacy Award</td>
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<td>06/19/2000</td>
<td>Section 1, Article II, Sub-Section 1</td>
<td>Redefined Associate Member</td>
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<tr>
<td>11/15/2000</td>
<td>Section 4, Sub-Section 4.3.1.a.vi.</td>
<td>Added Chairs/Co-Chairs to recommend changes to P&amp;P</td>
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<td>Section 4, Sub-Section 4.3.2.d.i</td>
<td>Defined Robert Thompson qualities</td>
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<td>11/15/2000</td>
<td>Section 4, Sub-Section 4.3.2.h</td>
<td>Changed this section to NASFAA Scholarship</td>
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<tr>
<td>11/15/2000</td>
<td>Section 4, Sub-Section 4.3.2.i.</td>
<td>Added this section on Association Leadership Award</td>
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<tr>
<td>11/15/2000</td>
<td>Section 4, Sub-Section 4.3.2.j.</td>
<td>Added this section on Preparation of Certificate &amp; Plaques</td>
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<td>Section 2, Subsection 2.2</td>
<td>Changed the Bylaws per the approved vote of the Membership</td>
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<td>Changed the Address of the Association</td>
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<td>Changed the timing of the Annual Meeting</td>
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<td>Article III, Section 3</td>
<td>Added Place of Meeting to include in person or electronic means</td>
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<td></td>
<td>Article III, Section 4</td>
<td>Added Notice of Meeting to include electronic means</td>
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<td></td>
<td>Article IV, Section 4</td>
<td>Added Special Meetings to include in person or electronic means</td>
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<td></td>
<td>Article V, Section 2</td>
<td>Changed the timing and purpose of Election and Term of Office</td>
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<td>Article V, Section 4</td>
<td>Added vacancy definition for Past President</td>
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<tr>
<td></td>
<td>Article V, Section 6</td>
<td>Added responsibility of President to assume role of Past President in the following membership year</td>
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<td>Article V, Section 7</td>
<td>Added responsibilities for Past President</td>
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<td>Changed section number to allow for addition of Section 7</td>
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<td></td>
<td>Article V, Section 11</td>
<td>Changed section number to allow for addition of Section 7 and added responsibilities for Secretary</td>
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<td>Article V, Section 13</td>
<td>Changed section number to allow for addition of Section 7</td>
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<td>Article V, Section 14</td>
<td>Changed section number to allow for addition of Section 7 and to include representatives of a member institution</td>
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<td>Article VIII, Section 2</td>
<td>Changed Issuance of Certificates to “may” be issued, not shall</td>
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<tr>
<td>Article XIV</td>
<td>Added Amendments to Bylaws to be adopted in person, electronically or by mail</td>
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<tr>
<td>04/28/03 Section I, Subsection 1.2</td>
<td>Grammatical changes made</td>
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<td></td>
<td>Changed spelling of Barberini in 10th paragraph</td>
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<td></td>
<td>Added that number of conference scholarships was increased to the members and update to bylaws approved by membership</td>
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<td>Section I, Subsection 1.3</td>
<td>Changed 02-03 school from Glendale CC to Mesa CC</td>
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<td></td>
<td>Added 2003-04 data</td>
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<tr>
<td>Section I, Subsection 1.4</td>
<td>Added 2001-02 recipient</td>
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<td>Section I, Subsection 1.5</td>
<td>Added Mr. Moe Hernandez</td>
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<td>Section I, Subsection 1.6</td>
<td>Added section of John Medley Financial Aid Advocacy Award</td>
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<tr>
<td>Section 2.2, Article 10, Section 15</td>
<td>Added Board Liaison description</td>
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<tr>
<td>Section 3, Subsection 1</td>
<td>Changed Professional Growth and Development to Conference</td>
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<tr>
<td>Section 3, Subsection 2</td>
<td>Updated Annual Dues</td>
<td></td>
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<tr>
<td>Section 3, Subsection 7</td>
<td>Amendment to who holds AASFAA credit cards</td>
<td></td>
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<tr>
<td>Section 3, Subsection 10</td>
<td>Changed Event Vendor Policy to Vendor Policy Amendments to Vendor Policy in general, and procedures</td>
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<tr>
<td>Section 3, Subsection 13</td>
<td>Amendment to Late Fee Policy</td>
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<tr>
<td>Section 3, Subsection 15</td>
<td>Updated Membership Listing Access in general, as well as the Committee notifying Treasurer, not Fiscal Planning and Development, in regards to bill payment.</td>
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<tr>
<td>Section 3, Subsection 17</td>
<td>Updated Article V, Section 12 to read Article V, Section 14. Updated allowance of reimbursement without receipt from $3.00 to $25.00.</td>
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<tr>
<td>Section 4, Subsection 4.1.0.d</td>
<td>Updated Article V, Section 12 to read Article V, Section 14.</td>
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<tr>
<td>Section 4, Subsection 4.1.0.h</td>
<td>Revises who is assigned the AASFAA credit cards</td>
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<tr>
<td>Section 4, Subsection 4.2</td>
<td>Revised Office Descriptions of Past President, President Elect, Vice President, Treasurer, Treasurer-Elect, and Secretary.</td>
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<tr>
<td>Section 4, Subsection 4.2</td>
<td>Updated Representative at Large to include both postsecondary and non-postsecondary membership.</td>
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<tr>
<td>Section 4, Subsection 4.2</td>
<td>Added Office of Board Liaison.</td>
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<tr>
<td>Section 4, Subsection 4.3.1.a.v</td>
<td>Omitted date deadline of June 1</td>
<td></td>
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<tr>
<td>Section 4, Subsection 4.3.1.b.iii</td>
<td>Grammatical changes made</td>
<td></td>
</tr>
<tr>
<td>Section 4, Subsection 4.3.1.d.iii</td>
<td>Updated Article V, Section 12 to read Article V, Section 14. Updated allowance of reimbursement without receipt from $3.00 to $25.00.</td>
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<tr>
<td>Section 4, Subsection 4.3.2</td>
<td>Updated Awards and Scholarships, in addition to including recipients.</td>
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<tr>
<td>Section 4, Subsection 4.3.3</td>
<td>Updated function of Conference Committee</td>
<td></td>
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<tr>
<td>Section 4, Subsection 4.3.3.g</td>
<td>Deleted Negotiation of Contract from Conference Committee (see Site Selection).</td>
<td></td>
</tr>
<tr>
<td>Section 4, Subsection 4.3.3.h</td>
<td>Updated to read Subsection 4.3.3.g</td>
<td></td>
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<tr>
<td>Section 4, Subsection 4.3.3.i</td>
<td>Updated to read Subsection 4.3.3.h</td>
<td></td>
</tr>
<tr>
<td>Section 4, Subsection 4.3.3.j</td>
<td>Updated to read Subsection 4.3.3.i</td>
<td></td>
</tr>
<tr>
<td>Section 4, Subsection 4.3.3.k</td>
<td>Updated to read Subsection 4.3.3.j</td>
<td></td>
</tr>
<tr>
<td>Section 4, Subsection 4.3.3.l</td>
<td>Updated to read Subsection 4.3.3.k</td>
<td></td>
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<tr>
<td>Section 4, Subsection 4.3.4.b</td>
<td>Included referral of Appendix F.</td>
<td></td>
</tr>
<tr>
<td>Section 4, Subsection 4.3.4.c</td>
<td>Budget recommendations now require Board approval, rather than Board review.</td>
<td></td>
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</table>
Section 4, Subsection 4.3.4.d Included statement regarding other sponsorship and vending opportunities that become available throughout the fiscal year.

Section 4, Subsection 4.3.4.f Dues Billing heading changed to Membership Dues. Changed wording to read that dues shall be tracked for documentation of income purposes only by Fiscal Planning and Development. Changed wording to read that payment remittance shall be directed to the Treasurer Elect, rather than the Treasurer.

Section 4, Subsection 4.3.4.g Included in Newsletter Advertisement, Postage for $320.00

Section 4, Subsection 4.3.4.h Maintenance of Sponsor/Vendor Policy to read only Vendor Policy.

Section 4.16 updated to Section 3.10.

Section 4, Subsection 4.3.4.j Membership List Serve Billing section deleted.

Section 4, Subsection 4.3.4.k Newsletter/Membership Directory Advertising Copy section deleted.

Section 4, Subsection 4.3.4.l Updated to read Subsection 4.3.4.j WASFAA Coordination changed to Joint Coordination. Revised who the Fiscal Planning and Development Committee is to coordinate with in avoiding solicitation conflicts.

Section 4, Subsection 4.3.4.m Updated to read Section 4.3.4.k Included statement that Yearly Notification of Opportunity is stated in Section 3.10 of this manual.

Section 4, Subsection 4.3.5 Revised Committee name from Multi-Cultural to Diversity

Section 4, Subsection 4.3.5.a Revised Function of Diversity

Section 4, Subsection 4.3.5.b Revised wording of minority/cultural to diversity

Section 4, Subsection 4.3.5.c Revised wording of minority/cultural to diversity

Section 4, Subsection 4.3.5.d Added subsection to include Encourage and Promote

Section 4, Subsection 4.3.5.d Updated to read Subsection 4.3.5.e Revised wording to include diverse populations rather than multicultural

Section 4, Subsection 4.3.6.b Revised how Newsletter chair receives a list of advertisers from Fiscal Planning and Development.

Section 4, Subsection 4.3.6.d Revised Policy to read that Advocate will be reviewed and approved by the current Newsletter Committee Board Liaison and the President.

Section 4, Subsection 4.3.6.e Revised Format processes in general

Section 4, Subsection 4.3.6.f Deleted section of Liaison Responsibilities

Section 4, Subsection 4.3.6.g Updated to read Subsection 4.3.6.f Revised how Newsletter is to be mailed to membership

Section 4, Subsection 4.3.6.h Updated to read Subsection 4.3.6.g Revised Latest Mailing Dates of Newsletter

Section 4, Subsection 4.3.6.i Revised how members are solicited and how ballots are mailed.

Section 4, Subsection 4.3.7.d Updated notification to include that the committee verify that each member is eligible to participate, not necessarily be in the Membership Directory.

Section 4, Subsection 4.3.8 Revised name of committee from Site Selection/Coordination to Site Selection.

Section 4, Subsection 4.3.8.a Added statement that Site Selection Chair serves as a member of the Conference Committee as Site Coordinator.

Section 4, Subsection 4.3.8.b Included vendor room within Contract Negotiation

Section 4, Subsection 4.3.10.b Changed Office of Treasurer to Treasurer Elect
Eliminated specific deadline dates

Included function to include IT in coordinating the online membership directory.

Section 4, Subsection 4.3.10.c
Changed Treasurer to Treasurer Elect
Updated how Membership Directories are to be distributed

Section 4, Subsection 4.3.10.c.i
Omitted July 15 deadline
Updated function on making initial contacts with printers and recommendation on how quotes are to be best obtained.

Section 4, Subsection 4.3.10.c.ii
Omitted August 15 deadline
Revised how ad artwork is received from vendors
Updated that Treasurer Elect shall provide listing of updated membership information

Section 4, Subsection 4.3.10.c.iii
Omitted due to inclusion in Section 4, Subsection 4.3.10.c
Section 4, Subsection 4.3.10.c.iv
Omitted due to inclusion in Section 4, Subsection 4.3.10.c
Section 4, Subsection 4.3.10.d
Omitted as this is the purpose of the AASFAA List serve
Section 4, Subsection 4.3.10.e
Updated to read Subsection 4.3.10.d
Section 4, Subsection 4.3.10.f
Updated to read Subsection 4.3.10.e
Section 4, Subsection 4.3.10.f
Omitted

Section 4, Subsection 4.3.11
Added Distance Learning Committee
Section 4, Subsection 4.3.12
Added Information and Technology Committee
Section 4, Subsection 4.3.13
Added Membership Training Committee
Section 4, Subsection 4.3.14
Added Regulatory Committee
Section 4, Subsection 4
Update Policies and Procedures Task Force Function to update the Policies and Procedures on an annual basis
Updated Required Membership to include the Secretary
Updated Duties to include Board Members and Committee Chairs
Update timeframe to provide a final copy to the President Elect prior to the Transition Meeting.

Section 4, Subsection 4
Added Tribal Financial Needs Analysis Process to Committee/Task Force Assignment

Appendix A
Updated to include current Expense Reimbursement Form

Appendix C
Updated to include current Committee Budget Form

Appendix D
Updated to include current Income Sheet

Appendix E
Updated to include current Committee Task Force Assignment and Responsibility Sheet

Appendix F
Added Sponsorship Opportunities packet

Appendix G
Updated to include current changed to the Policies and Procedures

09/10/04
Section 1, Subsection 1.3
Added 2004-05 data

Section 1, Subsection 1.4
Corrected 2001-02 data to reflect two recipients
Added 2002-03 recipient

Section 1, Subsection 1.6
Added two 2002-03 recipients

Section 4, Subsection 4.3.2.g
Updated to read Subsection 4.3.2.h

Section 4, Subsection 4.3.2.h
Updated to read Subsection 4.3.2.i

Section 4, Subsection 4.3.2.i
Updated to read Subsection 4.3.2.j

Section 4, Subsection 4.3.2.j
Updated to read Subsection 4.3.2.k

Section 4, Subsection 4.3.2.g
Added WASFAA Jerry R. Sims Management & Leadership Institute Scholarship

Section 4, Subsection 4.3.2.e.iii
Added 2003 recipients
Added 2004 recipients

Section 4, Subsection 4.3.2.f.iii
Added 2003 recipients
Added 2004 recipients

Section 4, Subsection 4.3.2.g.iii
Added 2003 recipients
Section 4, Subsection 4.3.2.h.iii  
Added Spring 2003 recipients

Section 4, Subsection 4.3.14  
Added Fall 2003 recipients

04/15/05  
Section 3, Subsection 3.9  
Updated Editorial Policy to include Listserve policy

Section 4, Subsection 4.2  
Updated Vice President description to reflect meeting responsibility to bring P and P and By-laws to each meeting

06/23/08  
Section 1, Subsection 1.2  
Added Tribal FNA project and award

Section 1, Subsection 1.3  
Updated President for 2008-09

Section 1, Subsection 1.4  
Updated Robert Thompson 2006-07 winner

Section 1, Subsection 1.6  
Updated John Medley 2006-07 to no winner

Section 1, Subsection 1.6  
Added award winner from 1997-98

Section 3, Subsection 3.16  
Renamed policy to Refund and Cancellation policy

Section 3, Subsection 3.16a  
Added new subsection for Refunds and Cancellations

Section 3, Subsection 3.16b  
Added new subsection for Vendor refunds

Section 4, Subsection 4.3.2.e.iii  
Updated WASFAA conference scholarships 2007

Section 4, Subsection 4.3.2.f.iii  
Updated WASFAA summer institute scholarships 2007

Section 4, Subsection 4.3.2.g.iii  
Updated Management Leadership scholarships 2007

Section 4, Subsection 4.3.2.h.iii  
Updated AASFAA conference scholarship for fall 2004

Section 4, Subsection 4.3.2.h.iii  
Updated AASFAA conference scholarships 2007

Section 4, Subsection 4.3.2.e.iii  
Updated FSA conference scholarships 2007

11/6/08  
Section 1, Subsection 1.4  
Updated Robert Thompson 2007-08 winners

Section 1, Subsection 1.6  
Updated John Medley 2007-08 to winner

5/26/09  
Article II- Members  
Updated per membership vote to include 4 classes of members

Article VI, Term of Office  
Updated to include Transition meeting as time for leadership changeover

5/12/11  
Section 1, Subsection 1.1  
Added AASFAA Mission Statement

Section 1, Subsection 1.4  
Added 2010-2011 President’s information

Section 1, Subsection 1.5  
Added Douglas Bullock’s full name

Added 2008-09 recipient information

Added 2009-10 recipient information

Added 2010-11 recipient information

Section 1, Subsection 1.6  
Added information about deceased members

Added Rhonda Neale and Gene Berg

Section 1, Subsection 1.7  

Added row for 2011-2012

Section 3  
Added rows to get section on next page

Section 3, Subsection 3.2  
Added “associate or individual”

Changed $50 to $75

Deleted “institution per”

Changed July to August

Section 3, Subsection 3.13  
Added “Fall”

Section 3, Subsection 3.15  
Changed $50 to $75

Section 3, Subsection 3.16  
Changed mailing address of Treasurer

Section 3, Subsection 3.16.b  
Changed mailing address of Treasurer

Section 3, Subsection 3.17  
Deleted “of the expense or by June 30 for all expenses incurred during the month of June”

Section 4  
Fixed alignment and indents throughout whole section

Section 4, Subsection 4.1.0.h  
Deleted “as well as review and confirm expenses which have been paid through the AASFAA Credit Cards assigned to the President, Treasurer, and a Board Member or Committee Chair at the discretion of the President and bank statements which validated such expenses.”
<table>
<thead>
<tr>
<th>Section 4, Subsection 4.2</th>
<th>Changed “One year commencing July 1” to “One year. Commencing at Transition Meeting or July 1, whichever comes first.”</th>
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<tbody>
<tr>
<td>Section 4, Subsection 4.3.2.e.iii</td>
<td>Added recipient information for 2008, 2009, 2010</td>
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<tr>
<td>Section 4, Subsection 4.3.2.f.iii</td>
<td>Added recipient information for 2008, 2009, 2010</td>
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<tr>
<td>Section 4, Subsection 4.3.2.g.iii</td>
<td>Added recipient information for 2008, 2009, 2010</td>
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<tr>
<td>Section 4, Subsection 4.3.2.h.iii</td>
<td>Added recipient information for 2008, 2009, 2010</td>
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<tr>
<td>Section 4, Subsection 4.3.2.i.iii</td>
<td>Added recipient information for 2008, 2009, 2010</td>
</tr>
<tr>
<td>Section 4, Subsection 4.3.4.g</td>
<td>Changed $50 to $75 in 2 places</td>
</tr>
<tr>
<td>Appendix A</td>
<td>Deleted outdated screen shot of form and gave link to online forms</td>
</tr>
<tr>
<td>Appendix C</td>
<td>Deleted outdated screen shot of form and gave FP&amp;D information</td>
</tr>
<tr>
<td>Appendix D</td>
<td>Deleted outdated screen shot of form and gave FP&amp;D information</td>
</tr>
<tr>
<td>Appendix F</td>
<td>Replaced 2007-2008 package information with 2010-2011 information</td>
</tr>
<tr>
<td>Appendix G</td>
<td>Updated to include current changes to the Policies and Procedures</td>
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</table>

11/12/2015 Section 1, Subsection 1.4 Bylaws Article V, Section 8

<table>
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<tr>
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<tbody>
<tr>
<td>Bylaws Article V, Section 8</td>
<td>Updated description to require Vice President having to be from a postsecondary institution per the approved vote of the Membership</td>
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2/20/2018 ByLaws Section 4.3.2.L.ii

<table>
<thead>
<tr>
<th>2/20/2018</th>
<th>Updated instructions for ordering plaques to no longer be limited to a single vendor in Tempe AZ.</th>
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<tbody>
<tr>
<td>OTHER:</td>
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<tr>
<td>1999 Expense Form Only</td>
<td>Changed mileage reimbursement rate to $0.32.5 cents/mile</td>
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<tr>
<td>2018 Expense Form Online</td>
<td>Changed mileage reimbursement rate to $0.54.5 cents/mile</td>
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