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*Revised: June 2018*  
*Revised: December 2018*  
*Revised: February 2019*  
*Revised: September 2019*  
*Revised: February 2020*  
*Revised: June 2025*  
*Revised: July 2025*

## I. INTRODUCTION

PASFAA Council has formally adopted the policy statements in this Policies and Procedures Manual as of the most recent date on each document. The procedural steps and all other text constitute approved procedures for implementing each policy. Officers, Committee Chair(s), etc. should look to the procedural text for guidance in policy implementation.

PASFAA operates on a July 1 - June 30 fiscal year and PASFAA Executive Council adopts a line-item budget for the Association each year. This Manual shall be a “living document” and may be changed throughout the year to meet the changing needs of the Association. This Manual shall be a reference for governing the activities of the Association and should be a facilitating document, not an inhibitor. PASFAA Council shall periodically review and, as necessary, add to, delete from or amend this Manual.

The Manual shall be maintained by the PASFAA Immediate Past-President. The responsibility for its up-to-date accuracy shall rest with the Membership and Association Governance Committee on an as-needed basis.

### **This PASFAA Policies and Procedures Manual consists of the following:**

- Statement of Good Practices
- Position Descriptions and Calendars of Officers and Representatives
- Standing Committees specified in the By-Laws
- Other Committees
- Events and issues that routinely occur in the activities and governance of the Association

### **There are six (6) Standing Committees of the Association. The standing Committees are as follows:**

- Government Relations
- Annual Conference
- Communications
- Membership and Association Governance
- Finance and Development
- PA Financial Aid Training
- Technology

### **There is currently one (1) Other Committee of the Association:**

- Financial Aid Awareness

All PASFAA Committees are to consist of a Committee Chair (or Co-Chairs), a Chair–Designee (if necessary or required) and Active (Regular) and Associate members in good standing with the Association. The Committees are responsible to the Association and as such all.

Committee members must be approved by the Executive Council prior to installation. In the interest of encouraging and engaging new membership and volunteerism, Committee Chairs are expected to solicit and choose their Committees after the Volunteer Sign-Up at the annual conference. Council strongly urges all members to serve on only one (1) Committee during the membership year. All efforts to engage new volunteers should be exhausted before asking Council to approve a member to serve on multiple Committees. When approving Committees, all Council members are to ensure the new members have a chance to serve and to be mindful of the need for inclusion when establishing Committees.

*Updated February 2019*

## II. PASFAA STATEMENT OF ETHICAL PRINCIPLES

The primary goal of the financial aid professional is to help students achieve their educational goals through financial support and resources. PASFAA strives to maintain the same high standards adopted by NASFAA, as outlined below.

We, financial aid professionals, declare our commitment to the following Statement of Ethical Principles.

### **Financial aid administrators shall:**

#### **Advocate for Students**

- Remain aware of issues affecting students and continually advocate for their interests at the institutional, state and federal levels.
- Support federal, state and institutional efforts to encourage students, as early as the elementary grades, to aspire to and plan for education beyond high school.

#### **Manifest the Highest Level of Integrity**

- Commit to the highest level of ethical behavior and refrain from conflict of interest or the perception thereof.
- Deal with others honestly and fairly, abiding by our commitments and always acting in a manner that merits the trust and confidence others have placed in us.
- Protect the privacy of individual student financial records.
- Promote the free expression of ideas and opinions, and foster respect for diverse viewpoints within the profession.

#### **Support Student Access and Success**

- Commit to removing financial barriers for those who want to pursue postsecondary learning and support each student admitted to our institution.
- Without charge, assist students in applying for financial aid funds.
- Provide services and apply principles that do not discriminate on the basis of race, gender, ethnicity, sexual orientation, religion, disability, age, or economic status.
- Understand the need for financial education and commit to educate students and families on how to responsibly manage expenses and debt.

#### **Comply with Federal and State Laws**

- Adhere to all applicable laws and regulations governing federal, state, and institutional financial aid programs.
- Actively participate in ongoing professional development and continuing education programs to ensure ample understanding of statutes, regulations, and best practices governing the financial aid programs.
- Encourage colleagues to participate in the financial aid professional associations available to them at the state, regional, or national level and offer assistance to other aid professionals as needed.

### **Strive for Transparency and Clarity**

- Provide our students and parents with the information they need to make good decisions about attending and paying for college.
- Educate students and families through quality information that is consumer-tested when possible. This includes (but is not limited to) transparency and full disclosure on award notices.
- Ensure equity by applying all need-analysis formulas consistently across the institution's full population of student financial aid applicants.
- Inform institutions, students, and parents of any changes in financial aid programs that could affect their student aid eligibility.
- Strive to ensure costs of attendance components are developed using resources that represent realistic expenses.

### **Protect the Privacy of Financial Aid Applicants**

- Ensure that student and parent private information provided to the financial aid office by financial aid applicants is protected in accordance with all state and federal statutes and regulations, including FERPA and the Higher Education Act, Section 483(a)(3)(E) (20 U.S.C. 1090).
- Protect the information on the FAFSA from inappropriate use by ensuring that this information is only used for the application, award, and administration of aid awarded under Title IV of the Higher Education Act, state aid, or aid awarded by eligible institutions.

*Revised by PASFAA Executive Council – December 2015  
June 2025*

### **III. PASFAA COMMUNITY & INCLUSION STATEMENT**

(review annually as social change may drive the need to name new underrepresented groups)

The focus of the work that PASFAA does must reflect the diversity of our community: the membership, our institutional sectors, and the students served by our institutions. The PASFAA community is rich with a diversity of experiences and perspectives of individual members. Sharing diverse ideas in an environment of mutual respect is a fundamental principle of fostering a sense of community and inclusion for PASFAA members.

Every PASFAA member has the opportunity to serve the organization and share their ideas and perspectives freely without limitations based on factors such as race, color, gender or gender identity, sexual orientation, disability, political ideology or affiliation, ethnicity, age, veteran status, religious beliefs, and other personal qualities that give individuals unique perspectives based on their distinct experiences. For PASFAA, diversity extends to the various sectors represented by the membership and the students we serve. It is the sharing of diverse ideas from differing perspectives through open communication that helps to build a stronger sense of community. As a community, it is essential that all groups are engaged and represented in our activities, including those groups which may be underrepresented within PASFAA.

Fostering community and inclusion as a fundamental strength of our organization is hard work. Every effort is made to promote the establishment of diverse working groups, including Committees, task forces and others who work on behalf of the PASFAA membership and the students served by the membership. It is the responsibility of PASFAA leadership to exemplify the need for community and inclusion and to engage and support new members by encouraging their involvement and seeking their assistance. New members bring fresh perspectives that can greatly enhance diversity of thought and action. In an inclusive environment, new PASFAA volunteers are given the opportunity to serve before others are given multiple opportunities.

Providing for engagement of all members by promoting open communication in an environment of respect and diversity as a fundamental goal helps to promote a sense of belonging and acts as a catalyst for building and sustaining a more inclusive PASFAA community.

## IV. POLICIES AND PROCEDURES MANUAL GUIDELINES

### Policy

The Membership and Association Governance Committee will maintain PASFAA's current Policies and Procedures Manual. It will physically be housed on the PASFAA Website.

### Procedures

**The PASFAA Policies and Procedures Manual consists of the following:**

- a. Job Descriptions and Calendars for PASFAA Council Members.
  - b. Standing Committees as specified by the Bylaws.
  - c. Other Committees.
  - d. Guidance on the issues relating to the activities and governance of PASFAA.
1. The Immediate Past President will make the manual available to Executive Council, Committee Chair(s) and the general membership for their use.
  2. The Membership and Association Governance Committee will receive updates from and disseminate changes to the PASFAA Executive Council for approval. Once approved, the appropriate sections of the manual will be updated accordingly.
  3. All policy and procedure recommendations must be checked for consistency with the Bylaws and other policies.
  4. The manual should be reviewed in its entirety every three (3) years by the Membership and Association Governance Committee.

*POLICY UPDATE: Secretary, Immediate Past President*

*July 1999*

*June 2005*

*April 2007*

*August 2012*

*June 2014*

*April 2016*

## **V. EXPECTATIONS FOR ALL OFFICERS ON THE EXECUTIVE COUNCIL**

Executive Council meetings normally occur five (5) times per year. Attendance is required. By accepting a position on the Executive Council, it is expected that the officer has the ability to attend all of the meetings and required events. If more than two (2) meetings are missed in a year, participation on Council will be reviewed by the Membership and Association Governance Committee for possible removal from Council. In addition, although it is understood that emergencies and/or family/work obligations may interfere with attendance, it is the responsibility of the officer to notify the President immediately of such occurrences.

Although all Executive Council members are encouraged to enter into Council discussions and to express their thoughts and opinions, only the following have voting rights/privileges on Council: President (in the case of a tie), President-Elect, Immediate Past-President, Vice President, Treasurer, Treasurer-Elect, Secretary and the Sector Representatives.

### **Communications Best Practices**

PASFAA Council Communication Best Practices for Council Meetings/PASFAA Post Articles, etc.

### **Objectives**

To define PASFAA leadership communication best practices for the purposes of:

- Engaging members in ways that serve to fulfill the PASFAA mission and promote the organization's sustainability.
- Approaching operational responsibilities in the same disciplined way we approach fiscal spending as a way of demonstrating a fundamental strength of PASFAA's leadership.
- Providing a timely and professionally written record of PASFAA activities to the organization's membership.
- Justifying expenditures.
- Demonstrating productivity to the membership.
- Recording activities for historical reference.

### **President Responsibilities/Best Practices**

1. Communicate with PASFAA members as needed.
2. Provide a written agenda draft and supporting documents to PASFAA Council prior to each Council meeting; solicit changes/additions to the agenda. Provide final agenda and supporting documents at each Council meeting.
3. Provide Council meeting highlights to the PASFAA membership within 2 weeks after each Council meeting.
4. Write the President's letter for each edition of the PASFAA Post and submit by the requested deadline.

## **Sector Representatives Communication Responsibilities/Best Practices**

1. Engage sector members regularly; ideas include:
  - a. Email sector membership prior to each PASFAA Council meeting to advise members of the upcoming meeting and to ask what issues they would like addressed with PASFAA leadership.
  - b. Forward emails/articles that are relevant to your sector members, for example NASFAA News articles, interesting news about financial aid topics, etc.
  - c. Remind sector members of upcoming events and encourage their participation in those events.
  - d. Encourage PASFAA volunteerism.
  - e. Ask for sector's participation in the charity raffle.
  - f. Schedule a meeting (by phone or in person) or webinar for sector members; ask for topic suggestions or suggest topics for members to pick from.
  - g. Email sector members to update them on the latest Council activities.
  - h. Solicit feedback on any communications sent to sector members.
2. Provide a written sector report to the Secretary prior to every Council meeting; bring copies to meetings for distribution or email report to Council members in advance of meeting; ideas include:
  - a. Report on any of the above actions taken in engaging the membership.
  - b. Report on the involvement of PASFAA sector members and their responses to outreach (even if there are no responses).
  - c. Report on any issues facing the sector.
  - d. Report on future plans to engage sector.
3. Post Council meeting sector reports on the PASFAA website within 2 weeks of each Council meeting.
4. Write an article for every edition of the PASFAA Post and submit by the requested deadline.
5. Write and submit to the Secretary an annual report for your sector by the requested deadline.

## **Committee Chair Communication Responsibilities/Best Practices**

1. Engage Committee members regularly as needed to fulfill the duties of the committee.
2. Provide expectations and deadlines to Committee members as needed.
3. Provide a written report of Committee activities to the Secretary prior to every Council meeting; bring copies of the report to Council meetings for distribution or email report to Council members in advance of meeting.
4. Post Council meeting Committee report on the PASFAA website within 2 weeks of each council meeting.
5. Write an article for every edition of the PASFAA Post and submit by the requested deadline.

6. Write and submit to the Secretary an annual report for Committee by the requested deadline.

### **Additional Responsibilities/Best Practices for Committee Chairs with Sub Committees**

1. Communicate these best practices to the Subcommittee Chairs.
2. Keep an open line of communication with Subcommittee Chairs in order to keep abreast of and report on Subcommittee activities.
3. Solicit a written report from Subcommittee Chairs for inclusion with report at each council meeting. All Subcommittee Chairs are to submit a written report to the Committee Chair for inclusion in the Committee Chair's written report to council.
4. Remind Subcommittee Chair to write and submit the required quarterly newsletter article by the requested deadline.
5. Collect an annual report from each Subcommittee Chair and submit to the Secretary by the requested deadline.

### **Secretary Responsibilities/Best Practices**

Secretary drafts meeting minutes and submits for review to PASFAA Council members within two (2) weeks of the Council meeting. Council members email proposed edits to the Secretary (copying all Council members) within one (1) week of receiving the draft from the Secretary. The approval of the final document will be at the next Council meeting. The approved minutes (with referenced reports included within the report as appendices) will be published to the website by the Secretary within three to four (3-4) weeks of each Council meeting.

### **Treasurer Responsibilities/Best Practices**

1. Solicit information from the Treasurer-Elect to insert in the written Treasurer's report. Present the combined report to the President prior to every Council meeting; bring copies of Treasurer's report to Council meetings for distribution or email to Council members in advance of Council meeting.
2. Post the Treasurer's report on the PASFAA website within two (2) weeks of each Council meeting.

### **Final Note: ALL**

The "Tiered Partner" sponsorship wording giving sponsorship credit to our business partners should appear on all email and other communications.

**Position Description**  
**PRESIDENT-ELECT**

***Length Of Service:*** Three (3) year total commitment; one (1) year term as President-Elect; followed by one (1) year as President and one (1) year as Immediate Past-President.

**Responsibilities: Executive Council**

**DUTIES:**

Serve as a voting member of Executive Council

Serves as the President-Elect of the Association. The President-Elect serves as the Parliamentarian, assists the President at Executive Council meetings and prepares for the Presidency.

**Responsibilities: Committee(S)**

**Pennsylvania Financial Aid Training (PFAT) Committee**

**DUTIES:**

Serves as the backup liaison (second to the President) between the PFAT Committee and Executive Council.

**Finance And Development (F & D) Committee**

**DUTIES:**

Serves as an ex-officio member and works with the Committee to develop the annual budget for the upcoming year.

**Pennsylvania State Grant Advisory Committee**

**DUTIES:**

Serves as a member of the Pennsylvania State Grant Advisory Committee.

*POLICY UPDATE: President-Elect - April 2007*

*August 2012*

*April 2013*

*June 2014*

*December 2015*

## **Calendar Of Activity**

### **PRESIDENT-ELECT**

#### **October**

- As outlined in the Bylaws, nominate an Active or Associate member to serve as Chair-Designees of the Conference Committee, the Finance and Development Committee and the PFAT Committee. Also, although Chair-Designees for other Committees will be nominated at the June Council meeting, it is recommended that potential designees be identified so they can serve on the current year Committee in order to provide continuity for the Committee.
- Attend PASFAA Conference. As one of the Association leaders, participate in conference events and activities including conference meals and other events recommended by the President.
- Attend PASFAA Executive Council meeting at Conference.
- Educate Council members on parliamentary rule to be used during Executive Council meetings.
- Begin to review all materials passed on from previous President-Elect.
- Attend PHEAA State Grant Advisory Committee meeting.

#### **December**

- Attend Executive Council Meeting.

#### **February**

- Attend the Executive Council meeting.
- Attend Pennsylvania State Grant Advisory Committee Meeting.

#### **March**

- Begin to develop goals for the following year. Communicate with them (and any projected costs) to the Finance and Development Committee through the budgeting process.
- Meet with the Finance and Development Committee to establish income goals and budget for next year.
- Attend NASFAA Leadership Workshop in Washington D.C.

#### **April**

- Attend the Executive Council meeting.

#### **June**

- Attend the Executive Council meeting.
- Nominate members to serve as Chair(s) for all Committees other than Conference, Finance and Development and PFAT (as the Chair-Designees for these three (3) Committees were already named at the first meeting of the year).

#### **August**

- Finalize goals for the Association for the term of office as President.

- Obtain from the President details of the responsibilities at the Annual Business Meeting.
- Prepare remarks for the Annual Business Meeting (Closing) at the conference when accepting the gavel.
- Buy a gift and have it engraved for presentation to the outgoing President.

### **September**

- In consultation with the President, prepare agenda for the Executive Council meeting at the conference.
- Transition duties to elected successor by initiating contact and providing all necessary documentation and logistical information.

### **October**

- Assume the duties of the PASFAA Presidency at the Annual Conference.

*POLICY UPDATE: President-Elect - July 1999  
April 2007  
April 2013  
June 2014*

**Position Description**  
**PRESIDENT**

***Length Of Service:*** One (1) Year Followed By A Year As Immediate Past President

**Responsibilities: Executive Council**

**DUTIES:**

- Schedule and conduct all Executive Council meetings; request written reports to be submitted at Council meetings; prepare agenda for Council meetings.
- Complete all required paperwork with the Treasurer and Treasurer-Elect to be bonded.
- At the end of the year of service, communicate the name of the new President to NASFAA.
- Recognize all incoming and outgoing members of the Executive Council
- Write an introductory letter for each issue of the PASFAA newsletter.
- Make any special arrangements for the conference (e.g., head table arrangements, special awards, inviting EASFAA President, choosing a key note speaker, inviting past Presidents and retirees, etc.).
- Serve as a member of the Pennsylvania State Grant Advisory Committee.
- Lead the organization and ensure compliance and fiduciary responsibility.
- **Attend EASFAA, PASFAA and NASFAA Conferences.**
- Serve as a voting member of Executive Council.

**Responsibilities: Miscellaneous**

**DUTIES:**

- The President or his/her designees will represent the Association with regard to special business on behalf of the Association (e.g. meetings with other organizations or agencies, etc.) or at functions that promote the Association.
- The President is an ex-officio member of all Committees of the Association and is encouraged to attend any and all meetings.
- The President will notify PHEAA's Vice President for State Grants and Special Programs of the new President-Elect who will serve on the State Grant Advisory Committee.
- **Even numbered year President's ONLY will serve on EASFAA for a two (2) year term.**

*POLICY UPDATE: President - July 1999  
April 2007  
June 2014  
December 2015  
September 2017  
December 2018*

## **Calendar Of Activity**

### **PRESIDENT**

#### ***October***

- Attend PASFAA Conference.
- Conduct an introductory Executive Council meeting at the conference for incoming and outgoing council members and Committee Chair(s).
- Provide a copy of the Community and Inclusion Statement to PASFAA Council for review of leadership responsibilities in supporting the community and inclusion goals of PASFAA.
- Make date/location arrangements for the Executive Council meetings to take place throughout the year.
- Email council meeting highlights to the membership.
- Attend the Pennsylvania State Grant Advisory Committee meeting.
- Complete signature cards for accounts and bonding as directed by the Treasurer.
- Notify the Website Coordinator to update the association's website with all necessary updates (e.g., Executive Council members, annual award winners, scholarship recipients, etc.).
- Organize a vote by council to finalize Committee members.
- Notify annual award winners' institutions/organizations (President's etc.).

#### ***November***

- Make final lodging, food & meeting arrangements for December Council meeting and the MAG meeting.
- Contact Council members and Committee Chairs for RSVP.
- Prepare agenda for the Executive Council meeting to be conducted in December.
- Prepare President's letter for the PASFAA Post newsletter.

#### ***December***

- Conduct the Executive Council meeting.
- Email council meeting highlights to the membership.
- Submit to NASFAA names of members of the Executive Council who will attend the NASFAA leadership conference.
- Identify PASFAA initiatives to be submitted in February for NASFAA State Awards.
- Organize a vote by council to finalize Committee members.

#### ***January***

- Prepare agenda for Executive Council meeting to be conducted in February.
- Make final lodging, food & meeting arrangements for February Council meeting and MAG meeting.
- Contact Council members and Committee Chairs for RSVP.

### **February**

- Conduct the Executive Council meeting.
- Email council meeting highlights to the membership.
- Prepare President's letter for the PASFAA Post newsletter.
- Attend the Pennsylvania State Grant Advisory Committee meeting.

### **March**

- Prepare agenda for the Executive Council meeting to be conducted in April.
- Make final lodging, food & meeting arrangements for April Council meeting and MAG meeting.
- Contact Council members and Committee Chairs for RSVP.
- Obtain conference fee recommendation from the Conference Chairperson. (This is to be presented to the Executive Council at the April meeting).
- Attend the Pennsylvania State Grant Advisory Committee meeting.

### **April**

- Conduct the Executive Council meeting, including the approval of the budget for next fiscal year as recommended by Finance and Development Committee
- Email meeting highlights to the membership.
- Attend the Pennsylvania State Grant Advisory Committee meeting.
- Prepare an article about nominations for the annual PASFAA awards for the PASFAA Post.

### **May**

- Prepare agenda for the Executive Council meeting to be conducted in June.
- Prepare president's letter for the PASFAA newsletter.
- Prepare a Newsletter article about nominations for PASFAA Awards.
- Participate in visits to the "Hill" with PASFAA's Government Relations Committee.
- Attend the EASFAA Conference.

### **June**

- Conduct the Executive Council meeting.
- Recommend names of recipients for PASFAA Awards to be approved by Executive Council.
- Send invitation to EASFAA President to bring EASFAA greetings to membership at the PASFAA conference.
- Send invitation to the PHEAA President to speak at the Annual conference.
- As the incoming EASFAA Representative, attend EASFAA retreat.

### **July**

- Finalize the Keynote speaker for the annual conference.

### **August**

- Prepare president's letter for PASFAA Post newsletter.
- Order and purchase appropriate plaques, gifts, etc., to be presented at the conference for outgoing Council members and for award recipients.
- Prepare the agenda for the annual business meeting at the conference.
- Notify President-Elect of his/her responsibilities at conference, specifically at the Closing Business Meeting.
- Assist the President-Elect in preparing the agenda for the Executive Council meeting at the conference.
- Notify NASFAA of name and contact information of PASFAA's incoming President.
- Invite PASFAA Past-Presidents to the annual membership luncheon during the annual conference.

### **September**

- Finalize arrangements for the Annual Conference with the Conference Committee.
- Finalize the Annual Report for posting to the PASFAA website.
- Transition duties to elected successor by initiating contact and providing all necessary documentation and logistical information.

*POLICY UPDATE: President - July 1999*

*April 2007*

*June 2014*

*December 2015*

*February 2018*

*July 2025*

**Position Description**  
**IMMEDIATE PAST-PRESIDENT**

***Length Of Service:*** One (1) Year As Immediate Past President

***Responsibilities: Executive Council***

**DUTIES:**

Serve as a voting member of Executive Council

***Responsibilities: Committee(s)***

***Membership And Governance Committee***

**DUTIES:**

- Serve as Chair of the Membership and Association Governance Committee. This Committee is responsible for soliciting nominations for positions on Executive Council, preparing for the election process; and announcing the results of the election as detailed in the By-Laws.
- Responsible for soliciting memberships throughout the year.
- Supervise the Association governance.
- Supervise updates to the Policies and Procedures Manual and to the Membership Brochure as applicable.

***Responsibilities: EASFAA Representative***

**DUTIES:**

- The EASFAA Representative is expected to attend all EASFAA Council meetings, provide PASFAA updates at the EASFAA Council meetings and for the EASFAA newsletter.
- The EASFAA Representative represents PASFAA at the EASFAA conference.
- The EASFAA Representative assists the EASFAA Training Chair and PFAT Chair in coordinating EASFAA training within Pennsylvania.
- The EASFAA Representative submits a report to Council for each meeting and writes an article at least annually for the PASFAA Post Newsletter.
- The EASFAA Representative will engage vendors at the EASFAA Conference and solicit support for PASFAA and sponsorship at our annual conference.
- If the President/Past President cannot fulfill this role, a designee can be appointed to serve as the EASFAA Representative. The EASFAA designee is invited to attend PASFAA Council meetings.

***Responsibilities: Miscellaneous***

**DUTIES:**

- Responsible for obtaining the membership vote after Executive Council has made motions to make changes in the Constitution and/or By-laws.
- Submit articles to the newsletter as requested by the editor.
- Solicit nominees for the Distinguished Service Award.

*POLICY UPDATE: Immediate Past President - July 1999*

*April 2007*

*April 2010*

*August 2012*

*June 2014*

*September 2017*

### **Calendar Of Activity**

#### **IMMEDIATE PAST-PRESIDENT**

##### **October**

- Attend PASFAA Conference. As one of the Association leaders, participate in conference events and activities including conference meals and other events recommended by the President.
- Attend the Executive Council meeting at the conference.
- As EASFAA Representative, attends EASFAA Council Meeting.
- Attend the Pennsylvania State Grant Advisory Committee meeting.

##### **November**

- Prepare agenda for Membership and Association Governance meeting.
- Prepare award recognition article for the PASFAA Post.
- With assistance from the past Conference Chair and our consulting firm as applicable, begin to identify site(s) for future annual conferences, including potential contracts that must be negotiated.
- Review the Strategic Plan every five (5) years.

##### **December**

- Lead the Membership and Association Governance Committee meeting.
- Attend the Executive Council meeting and report on the activities of the Membership and Association Governance Committee.

##### **January**

- Prepare agenda for Membership and Association Governance meeting.

##### **February**

- Lead the Membership and Association Governance Committee meeting.
- Attend the Executive Council meeting and report on the activities of the Membership and Association Governance Committee.
- Obtain Council approval for upcoming conference site(s), including contract(s) to be

- signed by President.
- Attend the Pennsylvania State Grant Advisory Committee meeting.

### ***March***

- Prepare agenda for Membership and Association Governance Committee meeting.
- As Membership and Association Governance Committee Chair, assist President (upcoming Immediate Past-President) with the preparation of budget for the Membership and Association Governance Committee for the upcoming year.
- As EASFAA Representative, attend EASFAA Council Meeting.
- The election process occurs between May and mid-August. The request for nominations must occur in March/April so that the candidates' names can appear in the summer PASFAA Post.
- Attend the Pennsylvania State Grant Advisory Committee meeting.

### ***April***

- Lead the Membership and Association Governance Committee meeting.
- Attend the Executive Council meeting and report on the activities of the Membership and Association Governance Committee.
- Write PASFAA Post article concerning the solicitation of nominations for the election of upcoming Executive Council offices.
- Attend the Pennsylvania State Grant Advisory Committee meeting.

### ***May***

- Submit text to Website Representative for a blast email announcing the solicitation of nominations for the election of upcoming year Council vacancies.
- Solicit nominations for Distinguished Service Award from four immediate past award recipients.
- As EASFAA Representative, attend EASFAA Conference.
- Prepare agenda for Membership and Association Governance Committee meeting.

### ***June***

- Lead the Membership and Association Governance Committee meeting.
- Attend the Executive Council meeting and report on the activities of the Membership and Association Governance Committee.
- Submit nominations for PASFAA elections to the Executive Council for consideration/approval.
- Confirm acceptances from nominated individuals and obtain biography (resume) and photograph for submission to PASFAA Post Editor and to Website Representative.
- Review with website Representative all information required to conduct elections in July.

### ***July***

- In conjunction with Website Representative, conduct elections for the upcoming year Council vacancies.
- Tally the votes and notify the appropriate Executive Council members (President and

President-Elect).

**August**

- Write PASFAA Post article announcing the winners of the PASFAA Executive Council elections.
- Transition duties to elected successor by initiating contact and providing all necessary documentation and logistical information.

*POLICY UPDATE: Immediate Past President - July 1999*

*April 2007*

*August 2012*

*June 2014*

*December 2015*

**Position Description**

**VICE PRESIDENT**

**LENGTH OF SERVICE:** Two (2) Year Term

**Responsibilities: Executive Council**

**DUTIES:**

To keep Executive Council informed on Federal and State issues. Serve as a voting member of Executive Council.

**Responsibilities: Committee**

**Government Relations Committee**

**DUTIES:**

Chair of the Government Relations Committee; this Committee visits Capitol Hill when appropriate to communicate with and educate legislators.

**Responsibilities: Miscellaneous**

**DUTIES:**

- As the Chair of the Government Relations Committee, may respond on behalf of the Committee and PASFAA to relevant Federal Notices of Proposed Rule Making and other legislative issues.
- Work with EASFAA and NASFAA Representatives on national financial aid concerns.
- Maintain a working relationship with PHEAA's Federal Relations Director.
- Submit reports for each issue of the PASFAA Post; submits other articles as requested by the PASFAA Post Editor.
- Prepare an annual report for the conference.

*POLICY UPDATE: Vice President - July 1999*

*April 2007*  
*June 2014*  
*December 2015*  
*July 2025*

## **Calendar Of Activity**

### **VICE PRESIDENT**

#### **October**

- Attend PASFAA Conference. Participate in conference events and activities including conference meals and other events recommended by the President.
- Attend the Executive Council meeting at annual PASFAA Conference.

#### **November**

- Submit an article for the Winter PASFAA Post.

#### **December**

- Attend the Executive Council meeting.
- Conduct a Government Relations Committee meeting or conference call with Committee members regarding legislative, federal and state issues.

#### **February**

- Conduct a Government Relations Committee meeting or conference call with Committee.
- Prepare an article for the Spring PASFAA Post.
- Attend the Executive Council meeting.
- Initiate preparations for the Committee visit to Capitol Hill in May.

#### **March**

- If applicable, prepare budget for the Government Relations Committee.

#### **April**

- Attend the Executive Council meeting.
- Finalize preparations for the Committee Visit to Capitol Hill in May.

#### **May**

- Committee trip to Washington, DC to meet with federal government staff on education related issues.
- Prepare an article for the Summer PASFAA Post.

#### **June**

- Attend the Executive Council meeting.

#### **August**

- Select members for Government Relations Committee and submit to the President for approval by the Executive Council for approval.
- Prepare annual report to be distributed at annual conference.
- Prepare an article for the Fall PASFAA Post.
- Transition duties to elected successor by initiating contact and providing all necessary documentation and logistical information.

*POLICY UPDATE: Vice President - July 1999  
April 2007  
June 2014  
December 2015*

## **Position Description**

### **TREASURER**

**Length Of Service:** One (1) Year Term

#### **Responsibilities: Executive Council**

##### **DUTIES:**

- To serve as the Treasurer of the Association and be bonded.
- Maintain all outgoing payments and bank accounts of the Association.
- Prepare reports on the quarterly budget and treasurer reports for all Executive Council meetings; Solicit incoming payment report from the Treasurer-Elect for inclusion in each Treasurer report.
- Ensure that all required Council members are bonded.
- Serve as a voting member of Executive Council.
- Train and mentor the Treasurer-Elect to prepare him/her for the Treasurer role.

#### **Responsibilities: Committees Conference Committee**

##### **DUTIES:**

To serve as a consultant to the Conference Committee.

#### **Finance And Development Committee**

##### **DUTIES:**

To serve as an ex-officio member of the Finance and Development Committee and as a liaison to Council.

#### **Responsibilities: Miscellaneous**

##### **DUTIES:**

- Pay bills, approve and pay expense reports and keep all financial records up-to-date.
- Reconcile account balances monthly.
- Notify the conference calling service provider of those council members and Committee Chair(s) who need to be added or deleted to the account for the new year.
- Arrange in consultation with the Treasurer-Elect for an annual review of books and preparation of income tax return by a Certified Public Accountant.
- Ensure that insurance policies remain current and are updated as needs change; work with the conference Chair to obtain an event insurance policy for the annual conference.
- Present annual Treasurer's report at the Conference; solicit and include income report from the Treasurer-Elect.
- Post the Treasurer's Report on the PASFAA web-site's Leadership page after each Council meeting.
- Prepare the scholarship checks with letters. Mail if not able to award at conference.

- Maintain official contracts and financial documents for audit purposes, for reference and for transition to successors.
- Work with the conference Chair and the Treasurer-Elect, as needed, in preparation of a report of income and expenditures of the conference.
- Certify and maintain records with the auditor to maintain PASFAA's non-profit status and federal tax-exempt status.

*POLICY UPDATE: Treasurer - July 1999*

*April 2007*

*June 2014*

*February 2015*

*December 2015*

*December 2018*

## **Calendar Of Activity**

### **TREASURER**

#### **October**

- Attend PASFAA Conference. Participate in conference events and activities including conference meals and other events recommended by the President.
- Prepare quarterly treasurer's and budget reports; solicit and include treasurer-elect reports.
- Conference: Pay bills and resolve refund issues.
- Notify the conference calling service provider of those Council members and Committee Chair who need to be added or deleted to the account for the new year.
- Update names and signature-related changes to credit card account and bank accounts due to change in presidency.

#### **November**

- In consultation with the Treasurer-Elect, prepare for the Executive Council meeting and Finance and Development Committee meeting.
- Attend Finance and Development Committee meeting.
- Finish any Conference financial wrap-up issues.

#### **December**

- Attend Executive Council meeting.

#### **January**

- Prepare quarterly treasurer's report and budget reports; solicit and include Treasurer-Elect report.
- Collect federal tax ids from unincorporated vendors to whom PASFAA paid more than six hundred (600.00) dollars.
- Mail to the accountant for preparation of 1099-misc tax forms.
- Mail 1099 forms received back from accountant.

#### **February**

- Attend the Executive Council meeting.

#### **March**

- Share Spring Training information with training Chair.

#### **April**

- Prepare quarterly treasurer's and budget reports; solicit and include treasurer-elect report.
- Attend the Executive Council meeting.
- Help with Spring Training registration as needed.
- Attend Finance and Development Committee meeting.

#### **May**

- Prepare upcoming year's budget report in collaboration with Treasurer-Elect.

### ***June***

- Attend the Executive Council meeting; collaborate with the conference Chair to finalize an event insurance policy for the annual conference.

### ***July***

- Prepare quarterly treasurer's and budget reports; solicit and include Treasurer-Elect report and pay bills.
- Contact Certified Public Accountant to arrange annual review of financial records.

### ***August***

- Conference activity: Resolve refund issues.
- Work with the Treasurer-Elect to transition the bank, investment firms, and insurance agencies to revise records with new Treasurer's information and effective date of transition.

### ***September***

- Conference activity: Pay bills and resolve refund issues.
- Arrange for name and signature-related changes to credit card account and bank accounts due to upcoming change in President and Treasurer.
- Transition duties to Treasurer-Elect by initiating contact and providing all necessary documentation and logistical information.
- Prepare scholarship checks and letters (when awarded).
- Complete music license and small games of chance annually.

*POLICY UPDATE: Treasurer - July 1999  
April 2007  
June 2014  
December 2015  
December 2018*

**Position Description**  
**TREASURER-ELECT**

**Length Of Service:** One (1) Year Term

**Responsibilities: Executive Council**

**DUTIES:**

- To serve as the Treasurer-Elect of the Association and be bonded.
- Maintain fiscal records for incoming payments to the Association.
- Prepare incoming payment report and submit to the Treasurer for inclusion in the Treasurer reports prior to all Executive Council meetings.
- Assist the Treasurer in all ways as requested except in making outgoing payments.
- Serve as a voting member of Executive Council.

**Responsibilities: Committees Conference Committee**

**DUTIES:**

To assist the Treasurer as a consultant to the Conference Committee regarding incoming payment of the conference fee.

**Finance And Development Committee**

**DUTIES:**

To serve as an ex-officio member of the Finance and Development Committee.

**Responsibilities: Miscellaneous**

**DUTIES:**

- Process and record membership dues, sponsor/business partner payments and registrations for the annual conference and all other training events.
- Reconcile incoming payment balances monthly.
- Assist the Treasurer as requested in arranging for an annual review of books and preparation of income tax return by a Certified Public Accountant.
- Maintain financial documents of incoming funds for audit purposes, for reference and for transition to successors.
- Monitor members and reach out to non-renewals.

*POLICY UPDATE: Treasurer-Elect - December 2018*

## **Calendar Of Activity**

### **TREASURER-ELECT**

#### **October**

- Attend PASFAA Conference. Participate in conference events and activities including conference meals and other events recommended by the President and/or Treasurer.
- Prepare quarterly income report for inclusion in treasurer report.
- Conference: Receive registrations, deposit payments, and send registration confirmations.

#### **November**

- In consultation with the Treasurer, prepare for the Executive Council meeting and Finance and Development Committee meeting.
- Attend Finance and Development Committee meeting.
- Finish any Conference financial wrap-up issues in consultation with Treasurer and Conference Chair.
- Monitor membership status and reach out to non-renewals.

#### **December**

- Attend Executive Council meeting.

#### **January**

- Provide incoming payment report to the Treasurer-Elect for inclusion in the quarterly treasurer's report and budget reports.

#### **February**

- Attend the Executive Council meeting.
- Receive and process Spring Training workshop checks.

#### **March**

- Record Spring Training fee payments.
- Share Spring Training information with training Chair.
- Attend Finance and Development Committee meeting

#### **April**

- Provide incoming payment report to the Treasurer for inclusion in the quarterly treasurer's report and budget reports.
- Attend the Executive Council meeting.
- Help with Spring Training registration as needed.

#### **May**

- Assist the Treasurer in preparing for the upcoming year's budget report.

#### **June**

- Attend the Executive Council meeting.

### **July**

- Provide incoming payment report to the Treasurer for inclusion in the quarterly treasurer's report and budget reports.
- Deposit checks.

### **August**

- Conference activity: deposit payments and send registration confirmations.
- Work with the Treasurer to transition the bank, investment firms, and insurance agencies to revise records with new Treasurer's information and effective date of transition.

### **September**

- Conference activity: Receive registrations, deposit payments, and send registration confirmations.
- Work with the Treasurer to arrange for name and signature-related changes to credit card account and bank accounts due to upcoming change in President and Treasurer.
- Transition duties to elected successor by initiating contact and providing all necessary documentation and logistical information.

*POLICY UPDATE: Treasurer-Elect - December 2018*

*July 2025*

**Position Description**  
**SECRETARY**

***Length Of Service:*** Two (2) Year Term

***Responsibilities: Executive Council***

**DUTIES:**

- Serve as the Secretary of the Association.
- Notify the members of any regularly scheduled meeting at least two (2) weeks prior to such meetings.
- Record official minutes at the Executive Council meetings; posts an electronic copy of approved Council minutes to the PASFAA website.
- Produce and distribute PASFAA letterhead.
- Coordinate the volunteer process, including the maintenance of the Association's volunteer list.
- Serve as a voting member of Executive Council.

***Responsibilities: Miscellaneous:***

**DUTIES:**

- Prepare annual report.
- Record official minutes at the opening/closing business meetings held during the Annual Conference.

*POLICY UPDATE: Secretary - July 1999  
April 2007  
August 2012  
June 2014  
December 2015*

## **Calendar Of Activity**

### **SECRETARY**

#### ***October***

- Provide Executive Council members with draft minutes from last Council meeting for comments on additions/deletions/changes.
- Participate in conference events and activities including conference meals and other events recommended by the President.
- Record official minutes at Annual Business Meeting and Executive Council meeting.
- Prepare new PASFAA letterhead with names of new Executive Council members.
- Post an electronic version of approved June Council meeting minutes on the PASFAA website.
- Provide President a copy of the approved minutes from Annual Business Meeting from last year's conference.

#### ***November***

- Distribute volunteer list to appropriate Committee Chairs.

#### ***December***

- Provide Executive Council members with draft minutes from last Council meeting for comments on additions/deletions/changes.
- Attend the Executive Council meeting and record official minutes.
- Post an electronic version of approved October Council meeting minutes on the PASFAA website.

#### ***February***

- Attend PASFAA Executive Council meeting and record official minutes.
- Post an electronic version of approved December Council meeting minutes on the PASFAA website.
- Submit article on Volunteerism for Spring PASFAA Post.

#### ***April***

- Provide Executive Council members with draft minutes from last Council meeting for comments on additions/deletions/changes.
- Attend PASFAA Executive Council meeting and record official minutes.
- Post an electronic version of approved February Council meeting minutes on the PASFAA website.

#### ***June***

- Provide Executive Council members with draft minutes from last Council meeting for comments on additions/deletions/changes.
- Attend PASFAA Executive Council meeting and record official minutes.
- Post an electronic version of approved April Council meeting minutes on the PASFAA website.

## ***September***

- Provide President with copy of minutes from last year's Annual Business Meeting to include in Annual Report.
- Prepare the Annual Report with the President for posting to the PASFAA Website.
- Coordinate the Volunteer Solicitation Campaign (e.g., sign-up sheets at Conference).
- Transition duties to elected successor by initiating contact and providing all necessary documentation and logistical information.

*POLICY UPDATE: Secretary - August 2012*

*April 2013*

*June 2014*

*December 2015*

**Position Description**  
**SECTOR REPRESENTATIVES**

**Public Two-Year Private**  
**PA State-related**  
**PA State System of Higher Education**  
**Health Sciences & Career Technology**  
**Institutional Support Services Graduate/Professional**

**Length Of Service:** Two (2) Year Term

**Responsibilities: Executive Council**

**DUTIES:**

The Sector Representative is an officer of the Association serving as a representative for the respective membership of the Association to make the views and concerns of members of the represented sector known to the leadership of the Association and to keep sector members informed of the actions of PASFAA Executive Council.

Serve as a voting member of Executive Council

**Responsibilities: Miscellaneous**

**DUTIES:**

- Serve as a member of the Membership and Association Governance Committee.
- Solicit input from sector on pertinent issues or agenda items.
- Encourage sector participation in PASFAA (volunteering and attending events)
- Conduct sector surveys as needed.
- Communicate at least quarterly via email or through social media to sector members. Share important information with sector such as emails/updates from PASFAA leadership, NASFAA, EASFAA, PHEAA and ED as needed/warranted.
- Conduct sector meeting at the annual conference.
- Arrange additional sector meetings (a minimum of quarterly is recommended) throughout the year.
- Maintain current/ up-to-date sector contact list
- Submit quarterly reports for publication in each issue of the PASFAA Post.
- Submit Sector report prior to each Executive Council meeting; submit annual report for inclusion in the Association's Annual report.
- Post sector meeting minutes and/or agendas on the PASFAA website.
- **Solicit and update the Shared Resource Site.**
- Assign a Scholarship Reader and forward contact information to the Scholarship Chair.
- The ISS Sector Representative will provide the Business Partner PowerPoint Template upon request.

*Policy Update: Sector Representative - July 1999*

*July 2005*  
*April 2007*  
*August 2012*  
*April 2013*  
*June 2014*  
*February 2015*  
*December 2015*  
*June 2025*  
*July 2025*

## **Calendar Of Activity**

### **SECTOR REPRESENTATIVES**

#### **October**

- Attend PASFAA Conference. Participate in conference events and activities including conference meals and other events recommended by the President.
- Conduct sector meeting at the conference.
- Attend Annual Business Meeting and Executive Council meeting at the PASFAA Conference.

#### **November**

- Article due November 15th for the winter issue of the PASFAA Post.

#### **December**

- Attend Membership and Association Governance Committee Meeting.
- Attend Executive Council Meeting.

#### **February**

- Article due February 15th for the spring issue of the PASFAA Post.
- Attend Membership and Association Governance Committee Meeting.
- Attend Executive Council Meeting.

#### **March**

- Submit Budget Request for upcoming year, if needed.
- Encourage/solicit completion of the volunteer form by sector members.
- Encourage/solicit nominations for office or Sector Representative for upcoming election.

#### **April**

- Attend Membership and Association Governance Committee Meeting.
- Attend Executive Council Meeting.
- Conduct Spring Training sector meetings, if requested.
- Solicit nominations for Leadership Development Workshop in applicable years.

#### **May**

- Article due May 15<sup>th</sup> for the summer issue of the PASFAA Post.
- Assign a scholarship reader for the PASFAA Scholarship.

#### **June**

- Attend Membership and Association Governance Committee Meeting.
- Attend Executive Council Meeting.

#### **August**

- Article due August 15th for the fall issue of the PASFAA Post.

**September**

- Submit annual report to the Secretary for inclusion in the Association's Annual Report.
- Solicit agenda items from sector members for sector meetings at the PASFAA conference.
- Transition duties to elected successor by initiating contact and providing all necessary documentation and logistical information.

*Policy Update: Sector Representatives - July 1999*

*April 2007*

*August 2012*

*April 2013*

*June 2014*

*December 2015*

## **VI. STANDING COMMITTEES**

### **Conference Committee**

#### **Duties:**

The PASFAA Conference Committee has the responsibility of planning all aspects of the annual PASFAA conference.

#### **Responsibilities:**

- The Conference Committee meets throughout the year, typically in December, February, April, June, and September at the conference site selected for that particular year.
- The Committee plans and organizes all aspects of the conference, including and not limited to:
  - Select a theme and design a logo for the conference.
  - Organize general sessions consisting of federal and state updates.
  - Develop concurrent training sessions on topics such as, current financial aid issues, professional development and technology.
  - Coordinate with the Finance and Development Committee for sponsorship opportunities.

#### **Conference Committee Chair/Co-Chairs:**

- The Conference Committee Chair/Co-Chair is responsible for maintaining the conference budget.
- The Conference Committee Chair/Co-Chair is responsible for completing and returning budget request forms.
- The Conference Committee Chair/Co-Chair collaborates with the Treasurer to purchase a special event insurance policy for the annual conference.
- The Conference Committee Chair/Co-Chair will coordinate with the Finance and Development Committee and the PASFAA Treasurer and Treasurer-Elect in determining an estimated conference budget which will be presented to the Executive Council. Executive Council will use the proposed conference budget to set the conference fee.
- Post Committee meeting minutes to the PASFAA website.
- The Committee Chair/Co-Chair must maintain a Committee “operations manual” and forward it to the new Chair upon completion of the term of service.
- The Conference Chair/Co-Chair will prepare a Committee report for each Executive Council meeting and is encouraged to attend all such meetings.
- The immediate-past Conference Committee Chair(s) assists the Immediate Past President in determining future conference site selections, unless Executive Council contracts with an outside agency.

**Membership:**

- The Conference Chair/Co-Chair is an active/regular or associate member selected and nominated by the President and approved by PASFAA Council.
- The Chair/Co-Chair-Designee(s) is nominated by the President-Elect and approved by PASFAA Council to serve as Chair(s) for the next Conference.
- The Committee should consist of eight (8) PASFAA members of which no more than two (2) are Associate Members and the remaining six (6) are Active members.
- The Committee must include as ex officio members:
  - The Website Coordinator
  - The ISS Sector Representative

**Conference Committee Fee Discount:**

In light of the Conference Committee's and the Treasurer's responsibilities prior to and during the actual conference and the Conference Committee members' inability to participate in most of the conference sessions/events, the Treasurer and all Committee members will receive a discount of up to two hundred fifty (250.00) dollars at the time that they register for the Conference (Amount cannot exceed the Registration Fee).

*PASFAA recognizes that all Committee members are volunteers of the association with personal and professional time commitments. The association expects, within reason, that Committee members will attend all scheduled meetings. If excessive absenteeism by any Committee member is resulting in undue hardship on the Committee at large, that Committee member can be asked to step down.*

**Expense Forms and Contracts:**

- The Conference Chair/Co-Chair are the only individual(s) authorized to approve and sign PASFAA Expense Reimbursement Forms for Committee members.
- The Conference Chair/Co-Chair is not authorized to sign any site contracts on behalf of PASFAA. The Chair/Co-Chair can make recommendations for future conference sites to Executive Council but the President is the only individual authorized to sign contracts.
- All contracts or expenditures must be approved by the Conference Chair.
- Contracts or expenditures in excess of two thousand (2000.00) dollars must be approved by the Conference Chair/Co-Chair, the President and President-Elect. Once approved, written notice must be provided to the Treasurer.
- Committee members are not permitted to incur PASFAA Expenses exceeding two hundred fifty (250.00) dollars, unless approved in advance by the Chair(s) and the President. Once approved, written notice must be provided to the Treasurer. To remain good fiscal stewards, please refer to this per diem calculator as a guideline when determining reasonable costs. <https://www.gsa.gov/travel/plan-book/per-diem-rates>

- Expenditures for conference entertainment should not exceed 10% of the total conference budget.
- Expenditures for conference decorations should not exceed 5% of the total conference budget. Prior to purchasing decorations, it is recommended that the Committee check PASFAA inventory.
- Expenditures for conference “take-aways” should not exceed 8% of the conference fee. Prior to purchasing “take-aways” it is recommended that the Committee check PASFAA inventory.
- Expenditures for attire (t-shirts, jackets, vest, hats, etc.) for all members of the Conference Committee are limited to \$1000. The Committee can use those funds at their discretion to purchase one or more pieces of attire for each individual.
- Expenditures for charity baskets is limited to supplies related to conducting the raffle itself (raffle tickets, etc.). No funds should be used to buy items to be raffled or to make and/or enhance any basket. Prior to purchasing any supplies, be sure to check inventory for any prior purchased unused supplies.
- All requests for reimbursement must be submitted to the appropriate people in a timely fashion.

*POLICY UPDATE: Conference Chair - July 1999*

*April 2007*

*February 2010*

*April 2013*

*June 2014*

*February 2015*

*February 2016*

*June 2016*

*December 2018*

*February 2019*

*June 2023*

## **Finance and Development Committee**

### **Duties:**

To monitor the financial viability of the Association, manage the sponsor solicitation process, and to recommend to Council appropriate courses of action to ensure financial strength including but not limited to development activities, investment policy, and budgeting.

### **Responsibilities:**

- The Finance and Development Committee will prepare and recommend a budget for the new fiscal year. Budget preparation and Business Partner solicitation will begin each January immediately preceding the fiscal year.
- The Finance and Development Committee will provide oversight and review of investment policies on a regular basis. It is recommended that a review be carried out at least yearly.
- The Finance and Development Committee has the primary responsibility for sponsorship solicitation to support association activities.
- In collaboration with the Executive Council and the PASFAA Committees, the Finance and Development Committee will determine the association activities which need financial support and will solicit the necessary support.
- The Finance and Development Committee acts as liaison with PASFAA sponsors and business partners. **Will conduct an annual conference call.**
- Post Committee meeting minutes to the PASFAA website.
- The Committee Chair/Co-Chairs must maintain a Committee “operations manual” and forward it to the new Chair(s) upon completion of the term of service.

### **Membership:**

- The Finance and Development Committee Chair/Co-Chair is an active or associate member nominated by the President and approved by PASFAA Council.
- The Chair/Co-Chair-Designee is nominated by the President-Elect and approved by PASFAA Council in preparation of assuming Chair duties in the future.
- President-Elect is an ex-officio member of this Committee.
- The Treasurer and Treasurer-Elect are ex-officio members of this Committee and must attend all meetings.
- The Committee consists of a minimum of three Active PASFAA members and three Associate PASFAA members. Each member serves a three (3) year term.

*PASFAA recognizes that all Committee members are volunteers of the association with personal and professional time commitments. The association expects, within reason, that Committee members will attend all scheduled meetings. If excessive absenteeism by any Committee member is resulting in undue hardship on the Committee at large, that Committee member could be asked to step down.*

**Expense Forms and Contracts:**

- The Chair/Co-Chair of the Finance and Development Committee are the only individual(s) authorized to approve and sign PASFAA Expense Reimbursement Forms for all Finance and Development Committee members.
- The Chair/Co-Chair of the Finance and Development Committee is not authorized to sign any contracts on behalf of PASFAA.
- No member of the Finance and Development Committee is permitted to incur PASFAA expenses exceeding five hundred dollars (\$500.00), unless approved by the Finance and Development Committee Chair(s) and PASFAA President. To remain good fiscal stewards, please refer to this per diem calculator as a guideline when determining reasonable costs. <https://www.gsa.gov/travel/plan-book/per-diem-rates>

*POLICY UPDATE: Finance and Development Committee Chair - July 1999  
April 2007  
February 2010  
April 2013  
June 2014  
February 2016  
June 2016  
December 2018  
June 2023  
July 2025*

## **Government Relations Committee**

### **Duties:**

To educate the membership concerning federal and state legislative, political, and regulatory matters, and to represent the Association with respect to legislative, political, and regulatory interests to governmental and quasi-governmental agencies.

### **Responsibilities:**

- Develop and implement strategies to monitor and influence policy and administration of federal student aid programs.
- Develop and implement strategies to inform and educate the Association membership on legislative, political, and regulatory issues.
- Track major federal and state financial aid initiatives and propose Association position statements for the Association to make its voice heard.
- Coordinate the Association's interest in legislative, political, and regulatory issues with governmental and quasi-governmental authorities.
- Plan and coordinate an annual Capitol Hill visit to Washington, DC to educate and inform congressional members and legislators on issues related to post-secondary education funding.
- Post Committee meeting minutes to the PASFAA website.
- The Committee Chair must maintain a Committee "operations manual" and forward it to the new Chair upon completion of the term of service.

### **Membership:**

- Vice President (Chair)
- Six to twelve (6-12) additional members, as necessary, selected by the Chair with the approval of PASFAA Council (with every attempt made to achieve representation from each sector of PASFAA).

*PASFAA recognizes that all Committee members are volunteers of the association with personal and professional time commitments. The association expects, within reason, that Committee members will attend all scheduled meetings. If excessive absenteeism by any Committee member is resulting in undue hardship on the Committee at large, that Committee member could be asked to step down.*

### **Expense Forms and Contracts:**

- The Chair of the Government Relations Committee is the only individual authorized to approve and sign PASFAA Expense Reimbursement Forms for all Committee members.
- The Chair of the Government Relations Committee is not authorized to sign any contracts on behalf of PASFAA.
- No member of the Government Relations Committee is permitted to incur PASFAA expenses exceeding two hundred (250.00) dollars, unless preapproved by the GRC Chair(s) and President. To remain good fiscal stewards, please refer to this per diem calculator as a guideline when determining reasonable costs.

*POLICY UPDATE: Government Relations Chair - July 1999  
April 2007  
June 2014  
June 2016  
June 2023  
July 2025*

## **Membership And Association Governance Committee**

### **Duties:**

Manage the membership and election matters of the organization.

### **Responsibilities:**

- Solicit nominations for the appropriate council positions that need to be filled for the upcoming year.
- Supervise and publicize the annual voting procedures and election results.
- Maintain and update the PASFAA Policies and Procedures Manual annually.
- Post Committee meeting minutes to the PASFAA website.
- The Committee Chair must maintain a Committee “operations manual” and forward it to the new Chair upon completion of the term of service.
- Review, on a yearly basis, the Membership Brochure and provide any updates to the Technology Committee in order that such changes can be sent to the website host for inclusion in the on-line version of the Membership Brochure.

### **Membership:**

- Chair is the Immediate Past President.
- Committee members are the current Sector Representatives.
- The President and President-Elect may serve as ex-officio members.
- The Committee normally meets at least four (4) times in a year.

*PASFAA recognizes that all Committee members are volunteers of the association with personal and professional time commitments. The association expects, within reason, that Committee members will attend all scheduled meetings. If excessive absenteeism by any Committee member is resulting in undue hardship on the Committee at large, that Committee member could be asked to step down.*

### **Expense Forms And Contracts:**

- As Committee Chair, the Immediate Past-President is the only individual authorized to approve and sign PASFAA Expense Reimbursement Forms for the Committee members.

- The Committee Chair is not authorized to sign any contracts on behalf of PASFAA.
- No member of the Membership and Governance Committee is permitted to incur PASFAA expenses exceeding \$250, unless approved by the MAG Chair and President. To remain good fiscal stewards, please refer to this per diem calculator as a guideline when determining reasonable costs. <https://www.gsa.gov/travel/plan-book/per-diem-rates>.

*POLICY UPDATE: Immediate Past President - July 1999*  
*April 2007*  
*June 2010*  
*August 2012*  
*June 2014*  
*April 2016*  
*June 2016*  
*February 2019*  
*June 2023*

## **Communication Committee**

### **Purpose:**

This Committee's purpose is to develop and provide opportunities for consistent, effective communications, branding, and marketing. The Committee should make PASFAA more visible, in a positive manner, to our members and non-members. Assigning duties to specific members will ensure the practice continues.

### **Duties:**

- Convene a minimum of four (4) times during the year, typically in November, February, May, and July, to organize and coordinate all Committee duties and activities.
- Post Committee meeting minutes to the PASFAA website.
- The Chair is encouraged to attend all PASFAA Council meetings.
- The Chair shall prepare all Committee reports for the PASFAA Executive Council meetings.
- The Chair will arrange for Communication articles to be submitted for each edition of the PASFAA Post by the Subcommittee Chair(s) as appropriate for their Committees and as requested by the PASFAA Post editor.
- The Chair, in consultation with the Chair-Designee, will submit the Budget Request Form to the Finance and Development Committee and submit budget updates at each Executive Council meeting.
- The Chair will prepare an annual report for the PASFAA Conference in October.
- The Chair should instruct all Subcommittee Chair(s) on policies related to reimbursement for dissemination to Subcommittee members.

- The Chair must maintain a Committee “operations manual” and forward it to the new Chair upon completion of the term of service.
- If necessary, the Chair will have final approval on all Subcommittee projects and public announcements to avoid duplication or inconsistent messaging.

**Membership:**

- The Committee Chair is an Active (Regular) or Associate member nominated by the President (during the President’s term as President-Elect) and approved by PASFAA Executive Council.
- The Chair-Designee is an Active (Regular) or Associate member nominated by the President-Elect and approved by PASFAA Executive Council.
- Members of the Communication Committee are the Chairs for each Communication Subcommittee. The Committee Subcommittees are:
  - PASFAA Post (Newsletter)
  - NextPAGE/Mentoring
  - NextPAGE/Shadowing
  - Scholarship
  - Historian

**Expense Forms and Contracts:**

- The Chair of the Communication Committee is the only individual authorized to approve and sign PASFAA Expense Reimbursement Forms for all Committee and Subcommittee members.
- No member of the Communication Committee or Subcommittee(s) is permitted to incur PASFAA expenses exceeding two hundred (250.00) dollars, unless approved by the Communication Chair and President. To remain good fiscal stewards, please refer to this per diem calculator as a guideline when determining reasonable costs. <https://www.gsa.gov/travel/plan-book/per-diem-rates>

*POLICY (for Communication Committee and all Subcommittees) - February 2015  
September 2017  
June 2023*

**Communication Subcommittee: PASFAA Post (Newsletter)**

**Purpose:**

This Committee is responsible for the Association’s newsletter that is published four times a year. Newsletter Committee members write topical articles, interview experts in the field, determine what new topics are acceptable for publishing and solicit feedback from colleagues.

**Duties:**

- The Editor serves as the Chair of the PASFAA Post Committee and is responsible for each issue of the PASFAA Post including: the establishment of content/article ideas; working with the Chair of the Finance and Development Committee to confirm eligible, paid advertisers and to obtain said ads from those business partners; the compilation and editing of articles; determining if submissions are acceptable for publishing; the layout of each issue; and communicating with Keybridge to publish content on the Newsletter website hosted on [pasfaa.org](http://pasfaa.org).
- The Editor is responsible for maintaining production of the PASFAA Post within a pre-approved annual budget.
- The Editor has final approval of pictures posted in the PASFAA Photo Gallery.
- The PASFAA Post Committee meets either in person or virtually a minimum of one (1) time to plan for the upcoming issues.
- Post Committee meeting minutes to the PASFAA website.
- Most communication between the Chair and the Committee takes place through email and phone calls.
- The Committee Chair must maintain a Committee “operations manual” and forward it to the new Chair upon completion of the term of service.

**Membership:**

- The Chair of the PASFAA Post Committee (Editor) is selected and approved by the Executive Council.
- There is no term limit on the PASFAA Post Committee Chair. The Chair may be an Active (Regular) or Associate PASFAA member.
- The Newsletter Committee consists of the Chair (Editor) and eight to ten (8-10) Associate or Active (Regular) PASFAA members.
- The PASFAA Post Committee membership tenure is liberal; Committee members can cycle on or off the Committee as desired by each individual member and coordinated/approved by the Committee Chair/Editor.

*PASFAA recognizes that all Committee members are volunteers of the association with personal and professional time commitments. The association expects, within reason, that Committee members will attend all scheduled meetings. If excessive absenteeism by any Committee member is resulting in undue hardship on the Committee at large, that Committee member could be asked to step down.*

**Expense Forms and Contracts:**

- All PASFAA Reimbursement Expense Forms for each Subcommittee must be submitted to the Communication Chair for approval and signature.
- All contracts related to the Subcommittee must be submitted to the Communication Chair to seek approval and authorization to sign.
- Committee members are not permitted to incur PASFAA Expenses exceeding two hundred (250.00) dollars, unless approved in advance by the Chair(s) and the President. To remain good fiscal stewards, please refer to this per diem calculator

as a guideline when determining reasonable costs.  
<https://www.gsa.gov/travel/plan-book/per-diem-rates>

*POLICY UPDATE: PASFAA Post Editor - July 1999  
April 2007  
June 2014  
October 2014  
February 2015  
February 2016  
September 2017  
February 2019  
June 2023*

### **Communication Subcommittee: The Cheryl DePaolis NextPAGE/Mentoring**

#### **Purpose:**

Provide new financial aid administrators (proteges) with seasoned, experienced financial aid administrators (mentors) to assist them in building a career in financial aid.

#### **Duties:**

- Identify new financial aid administrators (either from membership information, trainings, or Mentor Request Form. Update and post Mentor Request Form on the PASFAA website. Blast emails advertising program.
- Develop a list of seasoned members who are willing to be a mentor (through form).
- Match each protégé with a mentor with contact calendar.
- Schedule social networking and training events.
- Introduce new administrators to other members at Association sponsored events.
- Serve as a professional resource during the early stages of a financial aid administrator's career.

#### **Membership:**

- The Chair/Co-Chair of the Cheryl DePaolis NextPAGE Committee is selected and approved by the Executive Council.
- There is no term limit on the Cheryl DePaolis NextPAGE Committee Chair/Co-Chair. The Chair/Co-Chair may be an Active (Regular), Associate or Retired PASFAA member.
- The Cheryl DePaolis NextPAGE Committee consists of the Chair/Co-Chair(s) and eight to ten (8-10) Associate, Active (Regular) or Retired PASFAA members.
- The Cheryl DePaolis NextPAGE Committee membership tenure is liberal; committee members can cycle on or off the Committee as desired by each

individual member and coordinated/approved by the Committee Chair/Co-Chair.

*PASFAA recognizes that all committee members are volunteers of the association with personal and professional time commitments. The association expects, within reason, that committee members will attend all scheduled meetings. If excessive absenteeism by any committee member is resulting in undue hardship on the committee at large, that committee member could be asked to step down.*

**Expense Forms and Contracts:**

- All PASFAA Reimbursement Expense Forms for the NextPAGE Committee must be submitted to the NextPAGE Chair/Co-Chair for approval and signature.
- All contracts related to the Subcommittee must be submitted to the NextPAGE Chair to seek approval and authorization to sign.
- Committee members are not permitted to incur PASFAA Expenses exceeding two hundred (250.00) dollars, unless approved in advance by the Chair(s) and the President. To remain good fiscal stewards, please refer to this per diem calculator as a guideline when determining reasonable costs.  
<https://www.gsa.gov/travel/plan-book/per-diem-rates>

*POLICY UPDATE for NextPAGE/Mentoring Committee - February 2015  
February 2016  
September 2017  
June 2023*

**Communication Subcommittee: NextPAGE/Shadowing**

**Purpose:**

Provide newer financial aid administrators with a hands-on opportunity to observe the best practices of Directors and their staff, to include operations, meeting and time management, human resources and leadership skills. The program would provide an opportunity to experience an office through another lens and to form relationships with colleagues. Participating colleges and universities would include a variety of sizes and types.

PASFAA offers no financial assistance for the shadower, the shadow institution or for the shadowee. All expenses are the responsibility of the home institutions. PASFAA holds no responsibility for the shadowing experience or the topics covered since this is a personal training experience.

**Duties:**

- Identify interested financial aid administrators (shadowers or shadowees) either

from membership information, trainings, or the program participation Request Form.

- Create, update and post the Shadowing Request Form on the PASFAA website. This would include the requested topics and learning experience from the shadowee, and also those volunteering to be shadowers.
- Blast emails advertising the program.
- Develop a list of seasoned members who are willing to be shadowers.
- Match interested financial aid administrators (shadowees) with interested shadower host schools and contact person.
- Survey participants after their experiences.

### **Membership:**

- The Chair of the Shadowing Committee is selected and approved by the Executive Council.
- There is no term limit on the Shadowing Committee Chair. The Chair may be an Active (Regular), Associate or Retired PASFAA member.
- The Shadowing Committee consists of the Chair and up to ten Associate, Active (Regular) or Retired PASFAA members.
- The Shadowing Committee membership tenure is liberal; committee members can cycle on or off the committee as desired by each individual member and coordinated/approved by the Committee Chair.

### **Expense Forms And Contracts:**

- All PASFAA Reimbursement Expense Forms for the Shadowing Committee must be submitted to the Shadowing Chair for approval and signature.
- All contracts related to the Subcommittee must be submitted to the Shadowing Chair to seek approval and authorization to sign.
- Committee members are not permitted to incur PASFAA Expenses exceeding two hundred (250.00) dollars, unless approved in advance by the Chair(s) and the President. Once approved, written notice must be provided to the Treasurer. To remain good fiscal stewards, please refer to this per diem calculator as a guideline when determining reasonable costs. <https://www.gsa.gov/travel/plan-book/per-diem-rates>

*PASFAA recognizes that all committee members are volunteers of the association with personal and professional time commitments. The association expects, within reason, that committee members will attend all scheduled meetings. If excessive absenteeism by any committee member is resulting in undue hardship on the committee at large, that committee member could be asked to step down.*

## **Communication Subcommittee: Scholarship**

### **Purpose:**

This Committee organizes the PASFAA Student Scholarship. Awarding scholarships is dependent upon the fiscal well-being of the association; award made to one (1) student from each sector, with the exception of ISS Sector. Amount is capped at one thousand (1,000.00) dollars and not less than five hundred (500.00) dollars.

Scholarship winners will be selected based on their academic achievement and the content of their written statements.

### **Duties:**

- Develop calendar to announce scholarship competition to all PASFAA members.
- Update application form and accompanying information.
- Post forms to PASFAA website, announce on Facebook and through Sector Representative e-mail.
- Each Sector Representative must assign a reader. (Readers may ask others to assist in reading.)
- Divide applications by Sector and forward packet to a different sector-reader to select recipients, according to criteria established by the Executive Council.
- Notify President and Treasurer of winners. Arrange for certificates/letters and checks with Treasurer. Provide the Treasurer with a listing (names, addresses).

### **Membership:**

- The Chair of the Scholarship Committee is selected by the President and approved by the Executive Council.
- There is no term limit on the Scholarship Committee Chair. The Chair may be an Active (Regular) or Associate PASFAA member.
- The Scholarship Committee consists of the Chair and eight to ten (8-10) Associate or Active (Regular) PASFAA members who serve as Sector Reps.
- The Scholarship Committee membership tenure is liberal; committee members can cycle on or off the committee as desired by each individual member and coordinated/approved by the Committee Chair.

*PASFAA recognizes that all committee members are volunteers of the association with personal and professional time commitments. The association expects, within reason, that committee members will attend all scheduled meetings. If excessive absenteeism by any committee member is resulting in undue hardship on the committee at large, that committee member could be asked to step down.*

**Expense Forms And Contracts:**

- All PASFAA Reimbursement Expense Forms for the Scholarship Committee must be submitted to the Scholarship Chair for approval and signature.
- All contracts related to the sub-committee must be submitted to the Communication Chair to seek approval and authorization to sign.
- Committee members are not permitted to incur PASFAA Expenses exceeding two hundred (250.00) dollars, unless approved in advance by the Chair(s) and the President. Once approved, written notice must be provided to the Treasurer. To remain good fiscal stewards, please refer to this per diem calculator as a guideline when determining reasonable costs. <https://www.gsa.gov/travel/plan-book/per-diem-rates>

*POLICY UPDATE: Scholarship Committee - February 2015*

*February 2016*

*June 2023*

*June 2025*

## **Communication Subcommittee: Historian**

### **Purpose:**

- To preserve the history of the Association in terms of historical documents (i.e., PASFAA Post, minutes, directories, website, etc...)
- To serve as a liaison to the Executive Council and as the clearinghouse for historical documents.

### **Duties:**

- Report to Executive Council by way of the President on any issues that may arise concerning the preservation of PASFAA's historical documents.
- May be invited to Executive Council meetings.
- Attend PASFAA Conference.
- Prepare a PASFAA Post article.

### **Membership:**

- The Historian is selected and approved by the Executive Council.
- There is no term limit on the Historian. The Historian may be an Active (Regular), Associate, or Retired PASFAA member.
- The Historian may, at their discretion, add eight to ten (8-10) Associate, Active (Regular), or Retired PASFAA members to assist them.
- Members can cycle on or off the committee as desired by each individual member and coordinated/approved by the Historian.

*PASFAA recognizes that all committee members are volunteers of the association with personal and professional time commitments. The association expects, within reason, that committee members will attend all scheduled meetings. If excessive absenteeism by any committee member is resulting in undue hardship on the committee at large, that committee member could be asked to step down.*

### **Expense Forms And Contracts:**

- All PASFAA Reimbursement Expense Forms for the Historian Committee must be submitted to the Historian for approval and signature.
- All contracts related to the Subcommittee must be submitted to the Communication Chair to seek approval and authorization to sign.
- Committee members are not permitted to incur PASFAA Expenses exceeding two hundred (250.00) dollars, unless approved in advance by the Chair(s) and the President. Once approved, written notice must be provided to the Treasurer. To remain good fiscal stewards, please refer to this per diem calculator as a guideline when determining reasonable costs. <https://www.gsa.gov/travel/plan-book/per-diem-rates>

*POLICY UPDATE: Historian - February 2016*

*September 2017*

*June 2023*

## **Pennsylvania Financial Aid Training (PFAT) Committee**

### **Purpose:**

To provide for the training needs of the association as established by PASFAA.

### **Duties:**

Convene a minimum of two (2) times during the year, to organize and coordinate all Committee activities and training events.

- Post Committee meeting minutes to the PASFAA website.
- The Chair shall serve three (3) year term, minimum.
- The Chair shall prepare all PFAT Committee reports for the PASFAA Executive Council meetings.
- Arrange for PFAT articles to be submitted for each edition of the PASFAA Post by the Subcommittee Chair(s) as appropriate for their Committees and as requested by the PASFAA Post Editor.
- The Chair, in consultation with the Chair-Designee, will submit the Budget Request Form to the Finance and Development Committee and submit budget updates at each Executive Council meeting.
- At the end of the PFAT cycle each year, the Chair will submit a final report with detailed expenses and income.
- The Chair will prepare an annual report for the PASFAA Conference in October.
- The Chair should instruct all Subcommittee Chairs on policies related to reimbursement for dissemination to Subcommittee members.
- The Committee Chair must maintain a committee “operations manual” and forward it to the new Chair upon completion of the term of service.

### **Membership:**

- The Committee Chair is an Active (Regular) or Associate member nominated by the President (during the President’s term as President-Elect) and approved by PASFAA Executive Council.
- The Chair-Designee is an Active (Regular) or Associate member nominated by the President-Elect and approved by PASFAA Executive Council.
- Members of the PFAT Committee are the Chairs and Chair-Designees for each PFAT Subcommittee.
- The PFAT Subcommittees are:
  - Don Raley Institute
  - Leadership Development
  - Spring Training (may include track for support staff)
  - Webinar

*PASFAA recognizes that all committee members are volunteers of the association with personal and professional time commitments. The association expects, within reason, that committee members will attend all scheduled meetings. If excessive absenteeism by any committee member is resulting in undue hardship on the committee at large, that committee member could be asked to step down.*

**Expense Forms and Contracts:**

- The Chair of the PFAT Committee is the only individual authorized to approve and sign PASFAA Expense Reimbursement Forms for all Committee and Subcommittee members.
- The Chair of the PFAT Committee is not authorized to sign any training site contracts on behalf of PASFAA. The Chair should make recommendations for training sites to Executive Council. The President is the only individual authorized to sign contracts on behalf of the association.
- Other contracts related to the PFAT Committee should be reviewed by the PFAT Chair and forwarded to the President for signing.
- Committee members are not permitted to incur PASFAA Expenses exceeding two hundred (250.00) dollars, unless approved in advance by the Chair(s) and the President. Once approved, written notice must be provided to the Treasurer. To remain good fiscal stewards, please refer to this per diem calculator as a guideline when determining reasonable costs. <https://www.gsa.gov/travel/plan-book/per-diem-rates>

*POLICY UPDATE (for PFAT and all Subcommittees): PFAT Committee Chair - July 1999  
April 2007  
April 2013  
June 2014  
February 2015  
April 2016  
June 2016  
September 2017  
February 2019  
June 2023  
June 2025*

## **PFAT Subcommittee: Don Raley Institute Committee**

### **Purpose:**

To plan a training program for new or inexperienced financial aid administrators focusing on basic principles of the administration of student financial aid.

### **Duties:**

- Convene a minimum of four (4) times a year.
- Post committee meeting minutes to the PASFAA website.
- Revise, edit and prepare all training materials, request speakers and plan the curriculum for the program.
- The Subcommittee Chair will attend all PFAT Committee meetings and provide an update for each meeting.
- The Committee Chair must maintain a committee “operations manual” and forward it to the new Chair upon completion of the term of service.

### **Membership:**

- The Subcommittee Chair is a member of the PFAT Committee and is approved by PASFAA Executive Council.
- The Subcommittee Chair and Chair-Designee must be Active (Regular) and/or Associate Members of PASFAA.
- Subcommittee should consist of a maximum of seven (7) members, including the Subcommittee Chair and Chair-Designee.
- The Subcommittee members, including the Chair-Designee, typically are three (3) PASFAA members, one (1) of which can be an Associate member and three (3) additional Active PASFAA members that will also act as faculty for the workshops. Faculty members will commit to serve two (2) year terms with one (1) faculty member completing their term of service each year.

*PASFAA recognizes that all Committee members are volunteers of the association with personal and professional time commitments. The association expects, within reason, that Committee members will attend all scheduled meetings. If excessive absenteeism by any Committee member is resulting in undue hardship on the Committee at large, that Committee member could be asked to step down.*

**Expense Forms and Contracts:**

- All PASFAA Reimbursement Expense Forms for the DRI sub-committee must be submitted to the PFAT Chair for approval and signature.
- All contracts related to the sub-committee must be submitted to the PFAT Chair for review and transmittal to the President for approval and signature.
- Committee members are not permitted to incur PASFAA Expenses exceeding two hundred (250.00) dollars, unless approved in advance by the Chair(s) and the President. Once approved, written notice must be provided to the Treasurer. To remain good fiscal stewards, please refer to this per diem calculator as a guideline when determining reasonable costs. <https://www.gsa.gov/travel/plan-book/per-diem-rates>

*POLICY UPDATE (for PFAT Subcommittees): Don Raley Institute Committee - June 2025*

**PFAT Subcommittee: Fundamentals Workshop Committee –  
DISCONTINUED 2025****PURPOSE:**

To plan a pre-conference training program for new or inexperienced financial aid administrators.

**Duties:**

- Convene a minimum of four (4) times a year.
- Post committee meeting minutes to the PASFAA website.
- Revise, edit and prepare all training materials, request speakers and plan the curriculum for the program.
- The Sub-Committee Chair will attend all PFAT Committee meetings and provide an update for each meeting.
- The Sub-Committee Chair serves as the moderator for the Workshop.
- The Committee Chair must maintain a committee “operations manual” and forward it to the new Chair upon completion of the term of service.

**Membership:**

- The Sub-Committee chair is a member of the PFAT Committee and is approved by PASFAA Executive Council.
- The Sub-Committee Chair and Chair-Designee must be active members of PASFAA.
- The Sub-Committee should consist of a maximum of six (6) members, including the Sub-Committee Chair and Chair-Designee.
- The Sub-Committee members, including the Chair-Designee, are three (3) PASFAA members, one (1) of which can be an associate member and two (2)

additional active PASFAA members that will also act as faculty for the workshops. The two (2) faculty members will commit to serve two (2) terms with one (1) faculty member completing their term of service each year the workshop is offered.

*PASFAA recognizes that all committee members are volunteers of the association with personal and professional time commitments. The association expects, within reason, that committee members will attend all scheduled meetings. If excessive absenteeism by any committee member is resulting in undue hardship on the committee at large, that committee member could be asked to step down.*

**Expense Forms and Contracts:**

- All PASFAA Reimbursement Expense Forms for Fundamentals must be submitted to the PFAT Chair for approval and signature.
- All contracts related to the sub-committee must be submitted to the PFAT Chair for review and transmittal to the President for approval and signature.

*POLICY UPDATE (for PFAT Subcommittees): Fundamental Workshop Committee  
**DISCONTINUED 2025 - June 2025***

## **PFAT Subcommittee: Leadership Development Committee**

### **Purpose:**

To plan and provide a pre-conference Leadership Development Workshop for PASFAA members who aspire to leadership positions within the association. Attendance for the Leadership Development Workshop is limited to twenty (20).

### **Duties:**

- Convene a minimum of four (4) times a year.
- Post committee meeting minutes to the PASFAA website
- Revise, edit and prepare all training materials, request speakers and plan the curriculum for the program.
- The Workshop is offered in odd numbered years effective 2025.
- The Subcommittee Chair will attend all PFAT Committee meetings and provide an update for each meeting.
- The Subcommittee Chair serves as the moderator for the workshop.
- The Committee Chair must maintain a committee "operations manual" and forward it to the new Chair upon completion of the term of service.

### **Membership:**

- The Subcommittee Chair is a member of the PFAT Committee and is approved by PASFAA Executive Council.
- The Subcommittee Chair and Chair-Designee may be Active (Regular) and/or Associate members of PASFAA.
- The Subcommittee should consist of a maximum of six (6) members, including the Subcommittee Chair and Chair-Designee.
- The Subcommittee, in addition to the Chair and Chair-Designee, are four (4) Active or Associate PASFAA members, with representation from both types.

*PASFAA recognizes that all Committee members are volunteers of the association with personal and professional time commitments. The association expects, within reason, that Committee members will attend all scheduled meetings. If excessive absenteeism by any Committee member is resulting in undue hardship on the Committee at large, that Committee member could be asked to step down.*

### **Expense Forms and Contracts:**

- All PASFAA Reimbursement Expense Forms for Leadership must be submitted to the PFAT Chair for approval and signature.
- All contracts related to the Subcommittee must be submitted to the PFAT Chair for review and transmittal to the President for approval and signature.
- Committee members are not permitted to incur PASFAA Expenses exceeding two hundred (250.00) dollars, unless approved in advance by the Chair(s) and the President. Once approved, written notice must be provided to the Treasurer. To remain good fiscal stewards, please refer to this per diem calculator as a guideline when determining reasonable costs. <https://www.gsa.gov/travel/plan-book/per-diem-rates>

## **PFAT Subcommittee: Spring Training Committee**

### **Purpose:**

To plan and provide one (1) day training workshops. The workshops will be offered at both an eastern and western Pennsylvania site and will incorporate discussion and training on issues pertinent to financial aid administrators and support staff in the financial aid office and related offices.

### **Duties:**

- Convene a minimum of four (4) times a year.
- Post Committee meeting minutes to the PASFAA website.
- Revise, edit and prepare all training materials, request speakers and plan the curriculum for the program.
- The Subcommittee Chair will attend all PFAT Committee meetings and provide an update for each meeting.
- The Subcommittee Chair serves as moderator at both sites.
- The Committee Chair must maintain a committee "operations manual" and forward it to the new Chair upon completion of the term of service.

### **Membership:**

- The Subcommittee Chair is a member of the PFAT Committee and is approved by PASFAA Executive Council.
- The Subcommittee Chair and Chair-Designee must be Active (Regular) and/or Associate members of PASFAA.
- Subcommittee should consist of a maximum of seven (7) Active (Regular) and/or Associate members, including the Subcommittee Chair and Chair-Designee. Both membership types should be represented.

*PASFAA recognizes that all Committee members are volunteers of the association with personal and professional time commitments. The association expects, within reason, that Committee members will attend all scheduled meetings. If excessive absenteeism by any Committee member is resulting in undue hardship on the Committee at large, that Committee member could be asked to step down.*

### **Expense Forms and Contracts:**

- All PASFAA Reimbursement Expense Forms for Spring Training must be submitted to the PFAT Chair for approval and signature.
- All contracts related to the Subcommittee must be submitted to the PFAT Chair for review and transmittal to the President for approval and signature.
- Committee members are not permitted to incur PASFAA Expenses exceeding \$250, unless approved in advance by the Chair(s) and the President. Once approved, written notice must be provided to the Treasurer. To remain good fiscal stewards, please refer to this per diem calculator as a guideline when determining reasonable costs. <https://www.gsa.gov/travel/plan-book/per-diem-rates>

## **PFAT Subcommittee: Webinar Committee**

### **Purpose:**

To provide timely webinar training on issues pertinent to members

### **Duties:**

- Convene a maximum of four (4) times a year.
- Post committee meeting minutes to the PASFAA website.
- Provide a Webinar Series with Tier 1 Business Partners focused on professional development (November - May) and other training webinars as appropriate.
- Keep abreast of technology and the means to provide webinars.
- Select the topics and speakers with input from committee members, Executive Council, and general PASFAA membership.
- Advertise and create electronic registrations.
- The Subcommittee Chair will attend all PFAT Committee meetings and provide an update for each meeting.
- The Committee Chair must maintain a committee “operations manual” and forward it to the new Chairperson upon completion of the term of service.

### **Membership:**

- Subcommittee may consist of a maximum of four (4) members, including the Subcommittee Chair and Chair-Designee. Both the Chair and Chair-Designee can be Active or Associate PASFAA members.
- The Subcommittee Chair is a member of the PFAT Committee and is approved by PASFAA Executive Council.

*PASFAA recognizes that all committee members are volunteers of the association with personal and professional time commitments. The association expects, within reason, that committee members will attend all scheduled meetings. If excessive absenteeism by any committee member is resulting in undue hardship on the committee at large, that committee member could be asked to step down.*

### **Expense Forms and Contracts:**

- All PASFAA Reimbursement Expense Forms for Webinars must be submitted to the PFAT Chair for approval and signature.
- All contracts related to the sub-committee must be submitted to the PFAT Chair for review and transmittal to the President for approval and signature.
- Committee members are not permitted to incur PASFAA Expenses exceeding \$250, unless approved in advance by the Chair(s) and the President. Once approved, written notice must be provided to the Treasurer. To remain good fiscal stewards, please refer to this per diem calculator as a guideline when determining reasonable costs. <https://www.gsa.gov/travel/plan-book/per-diem-rates>

*Policy: Webinar Committee, February 2015*

*June 2023*

## **Financial Aid Awareness Committee**

### **Purpose:**

To educate the public about financial aid (e.g., the sources of aid and the financial aid process) while promoting an awareness of PASFAA and its mission to parents, students, high school and guidance staffs, the financial aid community and the community at large. Inform the public of new initiatives in financing higher education/savings mechanisms.

### **Duties**

- Organize volunteers to participate in PACAC, NACAC, and other regional college fairs.
- Serve as a Committee member for the NACAC Pittsburgh College Fair. If the Chair is from the eastern side of the Commonwealth, they must find an active volunteer from the western side to serve on the Pittsburgh committee.
- Coordinate with PHEAA to update and print materials for distribution at such fairs.
- Communicate with college fair site coordinators to identify any restrictions on acceptable materials to disseminate.
- Ship college fair materials to volunteers.
- Ensure that the website listing of financial aid night volunteers is current.
- Post Committee meeting minutes to the PASFAA website
- The Committee Chair must maintain a committee “operations manual” and forward it to the new Chair upon completion of the term of service.

### **Membership:**

- The Financial Aid Awareness Committee Chair is an Active (Regular) and/or Associate member nominated by the President and approved by PASFAA Council.
- The Chair-Designee is nominated by the President-Elect and approved by PASFAA Council.
- The Committee consists of a maximum of ten (10) members, including the Chair and Chair-Designee, with representatives from across the Commonwealth.
- AES/PHEAA’s communication officer will serve on the Committee and will serve as the liaison between the Financial Aid Awareness Committee, the Chair and AES/PHEAA.

*PASFAA recognizes that all Committee members are volunteers of the association with personal and professional time commitments. The association expects, within reason, that Committee members will attend all scheduled meetings. If excessive absenteeism by any Committee member is resulting in undue hardship on the Committee at large, that committee member could be asked to step down.*

**Expense Forms and Contracts:**

- The Chair of the Financial Aid Awareness Committee is the only individual authorized to approve and sign PASFAA Expense Reimbursement Forms for all Financial Aid Awareness committee members.
- The Chair of the Financial Aid Awareness committee is not authorized to sign any contracts on behalf of PASFAA; all contracts must be signed by the President.
- Committee members are not permitted to incur PASFAA Expenses exceeding \$250, unless approved in advance by the Chair(s) and the President. Once approved, written notice must be provided to the Treasurer. To remain good fiscal stewards, please refer to this per diem calculator as a guideline when determining reasonable costs. <https://www.gsa.gov/travel/plan-book/per-diem-rates>

*POLICY UPDATE: FA Awareness Committee - April 2007*

*June 2014*

*April 2016*

*June 2016*

*February 2019*

*June 2023*

## **Technology Committee**

**PURPOSE:** Provide technology-related updates, information, and services relevant to the association.

### **DUTIES:**

- Oversee the activities of the Event Coordinator Subcommittee and the Website Coordinator Subcommittee.
- Ensure Executive Council and the various association committee chairs receive the technology-related assistance they need to fulfil their roles.
- Work with the appropriate subject matter experts to maintain the various resource sections of the PASFAA web site.
- Produce resource materials as requested by PASFAA Council.
- Monitor a maintenance and replacement plan for all computer hardware owned by PASFAA.
- Monitor and maintain PASFAA's email accounts.
- Maintain a list of the association's account login credentials for various programs and applications.
- The Technology Committee Chair must maintain a committee Operations Manual, to include a Calendar of Activities, and forward it to the new Chair upon completion of the term of service.
- Provide a written report for each Executive Council meeting.
- Submit a budget request every year, in accordance with instructions from the Finance and Development Committee.
- Submit an article for each edition of the PASFAA Post newsletter.
- Produce an Annual Report at the end of each membership year.

### **MEMBERSHIP:**

- The Technology Committee Chair is an active (regular) or associate member nominated by the President and approved by PASFAA Council. The Chair-Designee is nominated by the President-Elect and approved by PASFAA Council.
- Members of the Technology Committee are selected by the Chair and approved by Executive Council.
- Technology Committee typically will not exceed four members, including the Chair. The Chair or designee is expected to be at the Executive Council meetings to provide updates and receive feedback.

*PASFAA recognizes that all committee members are volunteers of the association with personal and professional time commitments. The association expects, within reason, that committee members will attend all scheduled meetings. If excessive absenteeism by any committee member is resulting in undue hardship on the committee at large, that committee member could be asked to step down.*

### **EXPENSE FORMS AND CONTRACTS:**

- The Chair of the Technology Committee is the only individual authorized to

approve and sign PASFAA Expense Reimbursement Forms for members of the Technology Committee, Event Planning Subcommittee, and Website Coordinator Subcommittee.

- The Chair of the Technology Committee is not authorized to sign any contracts on behalf of PASFAA; all contracts must be signed by the President.
- Committee members are not permitted to incur PASFAA Expenses exceeding \$250, unless approved in advance by the Chair(s) and the President. Once approved, written notice must be provided to the Treasurer. To remain good fiscal stewards, please refer to this per diem calculator as a guideline when determining reasonable costs. <https://www.gsa.gov/travel/plan-book/per-diem-rates>

*POLICY UPDATE: Technology Committee  
June 2023  
June 2025*

## **Technology Subcommittee: Website Coordinator**

### **Purpose:**

To manage the Association's internet presence

### **Duties:**

- Monitor the PASFAA website and initiate necessary changes.
- Review blast email requests and approve or disapprove in accordance with established association procedures.
- Maintain and update, in conjunction with the Communication Committee, all social media channels (e.g., YouTube, LinkedIn, Twitter and Facebook).
- Ensure the photos and contact information for all PASFAA officers, committee chairs, sub-committee chairs, and sector representatives are accurate on the website, especially right after elections.
- Provide periodic reminders to PASFAA members, officers, committee chairs, subcommittee chairs, sector representatives, and others as appropriate, to review their areas of responsibility on the PASFAA website and submit necessary requests for updates.
- Accomplish directly or coordinate with a website development contractor, as necessary, to complete website updates as requested by PASFAA members, officers, committee chairs, sub-committee chairs, sector representatives, and others.
- Post meeting minutes, task lists, budget summaries, website usage statistics, and other pertinent information to the Website Coordinator page on the PASFAA website.
- Monitor job listings and send an email to the membership.
- Ensure that only the appropriate association leaders (as approved by PASFAA Council) have access to administrative functions on the website.
- Assist Council members, committee chairs, sub-committee chairs, sector representatives, and anyone else who has administrative access to the PASFAA website with questions or issues they may have, related to the use of this access.
- Consult with the PASFAA President, Technology Committee chair, and others to approve and send blast email messages to the membership, ensuring compliance with the association's Electronic Messaging rules.
- Periodically obtain website usage statistics and report these to PASFAA Council.
- Attend Technology Committee and PASFAA Executive Council meetings, as necessary/required.
- Work with the Finance and Development Committee, the ISS Sector Representative, and others as necessary to assure that PASFAA business partners' ads, blast email attributions, and other benefits are appropriately reflected.
- The Website Coordinator Subcommittee Chair must maintain a committee Operations Manual, to include a Calendar of Activities, and forward it to the new Chair upon completion of the term of service.
- Direct the activities of Website Coordinator Subcommittee members.

- Provide a written report for each Executive Council meeting.
- Submit a budget request to the Technology Committee Chair every year, in accordance with instructions from the Finance and Development Committee.
- Submit an article for each edition of the PASFAA Post newsletter.
- At the end of each membership year, submit an Annual Report to the Technology Committee Chair.

#### **Membership:**

- The Website Coordinator Subcommittee consists of no more than five members.
- The Website Coordinator is nominated by the Technology Committee Chair and/or the PASFAA President, with the nomination forwarded to PASFAA Council for approval.
- The Website Coordinator and all subcommittee members must be active or associate members of PASFAA.

*PASFAA recognizes that all Committee members are volunteers of the association with personal and professional time commitments. The association expects, within reason, that Committee members will attend all scheduled meetings. If excessive absenteeism by any Committee member is resulting in undue hardship on the Committee at large, that Committee member could be asked to step down.*

#### **Expense Forms and Contracts:**

- All PASFAA Reimbursement Expense Forms must be submitted to the Technology Committee Chair for approval and signature.
- All contracts related to the Website Coordinator's duties must be forwarded to the Technology Committee Chair for review and transmittal to the President for approval and signature.
- Committee members are not permitted to incur PASFAA Expenses exceeding \$250, unless approved in advance by the Chair(s) and the President. Once approved, written notice must be provided to the Treasurer. To remain good fiscal stewards, please refer to this per diem calculator as a guideline when determining reasonable costs. <https://www.gsa.gov/travel/plan-book/per-diem-rates>

#### **Technology Committee: Event Coordinator**

**Purpose:** To coordinate the technology-related aspects of the association's events

#### **Duties:**

- Serve as ex officio member of Conference Committee, Spring Training Subcommittee, Don Raley Institute Subcommittee, Fundamentals Subcommittee, Leadership Subcommittee, and Webinars Subcommittee.
- Participate in those groups' activities to the extent necessary to coordinate the technology-related aspects of their virtual, hybrid, and in-person events.

- It is expected that ex officio committee participation can be accomplished primarily via virtual means (e.g., Zoom or other platform). Typically, this will not require participation in every meeting or in the entirety of each meeting attended.
- Analyze the hardware and software requirements for each event.
- Determine prices of any additional hardware and software needed, producing expenditure requests for consideration by the Technology Committee Chair, who will forward them to Executive Council, as appropriate.
- Travel to hybrid and in-person event locations only when necessary to work with site representatives and committee members regarding set-up.
- Maintain proficiency with the software platforms needed to conduct events (at the time of this writing, the platforms include Cvent, MembershipWorks, and WordPress).
- Direct the activities of Event Coordinator Subcommittee members.
- Provide a written report for each Executive Council meeting.
- Submit a budget request to the Technology Committee Chair every year, in accordance with instructions from the Finance and Development Committee.
- Submit an article for each edition of the PASFAA Post newsletter.
- At the end of each membership year, submit an Annual Report to the Technology Committee Chair.

#### **Membership:**

- The Event Coordinator Subcommittee consists of no more than five members.
- The Event Coordinator is nominated by the Technology Committee Chair and/or the PASFAA President, with the nomination forwarded to PASFAA Council for approval.
- The Event Coordinator and all subcommittee participants must be active or associate members of PASFAA.

*PASFAA recognizes that all Committee members are volunteers of the association with personal and professional time commitments. The association expects, within reason, that Committee members will attend all scheduled meetings. If excessive absenteeism by any Committee member is resulting in undue hardship on the Committee at large, that Committee member could be asked to step down.*

#### **Expense Forms and Contracts:**

- All PASFAA Reimbursement Expense Forms must be submitted to the Technology Committee Chair for approval and signature.
- All contracts related to the Event Coordinator's duties must be forwarded to the Technology Committee Chair for review and transmittal to the President for approval and signature.
- Committee members are not permitted to incur PASFAA Expenses exceeding \$250, unless approved in advance by the Chair(s) and the President. Once approved, written notice must be provided to the Treasurer. To remain good fiscal stewards, please refer to this per diem calculator as a guideline when determining reasonable costs. <https://www.gsa.gov/travel/plan-book/per-diem-rates>

*POLICY UPDATE: Technology Committee Chair - July 1999*  
*April 2007*  
*June 2010*  
*February 2015*  
*December 2015*  
*April 2016*  
*June 2016*  
*September 2017*  
*February 2019*  
*September 2019*  
*June 2023*  
*July 2025*

## **VII. EVENTS AND ISSUES**

### **ISSUE: Acceptable Training and Session Content**

#### **POLICY:**

All general sessions at any PASFAA sanctioned event are created with the intent of training and updating our members.

#### **PROCEDURE:**

The content of the general sessions should reflect PASFAA policy by including relevant federal and/or state aid updates, issues, and training content.

General session content will expressly avoid advertising, updating, or otherwise providing information in regard to any presenter specific product or benefit. In other words, the general session cannot be used to market or otherwise inform the audience about specific products outside of the federal and state training and updates. The conference Committee Chair or Chair-Designee will ensure that all scheduled general session providers receive this directive prior to the general session. Consequences will be at the discretion of the executive council but may include restriction of vendor privileges and/or membership revocation.

#### **POLICY:**

While volunteering for any PASFAA sanctioned or sponsored event in a capacity that represents PASFAA broadly, the member will not support, advertise, or otherwise inform the attendees of that event with regard to any specific product or opportunity outside of the state grant programs, Federal funds, and other means of financing an education generally.

#### **PROCEDURE:**

No member shall promote a specific product or opportunity other than the Pennsylvania (and other) State Grant(s), Federal grant opportunities, and loans broadly as they relate to obtaining an education. There shall be no branding other than the PASFAA logo and name, outside of the FAFSA which is a registered trademark of the United States Department of Education. Specifically, PASFAA Representatives should not distribute or make available to event attendees any lender-branded references or materials unless prior approval from Executive Council has been granted. This includes, but is not limited to, printed educational materials. PASFAA, and its Designees, shall remain neutral as it pertains to specific products where choice and terms and conditions are variable.

*POLICY UPDATED: June 2025*

## **ISSUE: Alcohol Reimbursement**

### **POLICY:**

PASFAA does not pay for alcohol consumed by Members, Officers, Committee Chairs, etc.

### **PROCEDURES:**

1. Alcohol ordered at PASFAA meetings, events, dinners, etc. should be ordered by individuals and billed individually.
2. Members of group dinners who choose to consume alcohol should request separate checks to avoid having alcohol consumed at the table billed to PASFAA on the group bill.
3. Committee Chairs and other event leaders are required to remind members of this policy.
4. Members must use official travel expense reimbursement forms to record expenses and under no circumstances should alcohol expenses be reported on the PASFAA reimbursement form.

*POLICY UPDATED: July 1999*

*April 2007*

*February 2013*

*April 2016*

*June 2023*

## **ISSUE: Annual Financial Statements, Audit, and Tax Preparation**

### **POLICY:**

The Association's finances are to be reviewed annually by an independent certified public accountant recommended by the Treasurer in consultation with the Treasurer-Elect and approved by the PASFAA Executive Council.

### **PROCEDURES:**

1. The Treasurer, Treasurer-Elect and auditor should begin the annual process no later than July each year. The auditor will specify the information needed to conduct the audit including a statement describing the sources of income and expenses for the year, copies of invoices, cancelled checks, the Association checkbook and any other documents/items needed.
2. The auditor will prepare a draft audit report and discuss, refine, and finalize it in consultation with the Treasurer and Treasurer-Elect.
3. The Treasurer will solicit an income report from the Treasurer-Elect and will prepare the annual financial statement to include the Treasurer-Elect's report to be presented to the membership at the Annual Business Meeting.
4. The auditor prepares the annual federal tax return as part of the annual audit.

*POLICY UPDATE: Treasurer - July 1999  
April 2007  
February 2013  
April 2016  
December 2018  
June 2025*

## **ISSUE: Annual Budget Development and Management**

### **POLICY:**

PASFAA Executive Council, with assistance from the Finance and Development Committee and the Treasurer and Treasurer-Elect are responsible for developing and managing the annual budget of the Association.

### **PROCEDURES:**

1. All Council members and Committee Chairs, in consultation with respective Chair-Designees, receive budget sheets and prior year budget information for their area(s). Using these documents and their own plans for the year, a budget request must be submitted in May.
2. In March, the Finance and Development Committee reviews expenditure requests and income projections and prepares a recommended line-item budget for PASFAA Executive Council to review, amend as necessary, and approve at its April meeting.
3. At the end of each quarter, the Treasurer prepares written Budget and Treasurer's Reports for historical and tax purposes. Also, immediately prior to PASFAA Council meetings, the Treasurer prepares written Budget and Treasurer's reports reflecting the most current information for presentation at each Executive Council meeting. The Treasurer solicits income information from the Treasurer-Elect for inclusion in all reports
  - a. The Budget Report reflects activity since the beginning of the fiscal year and compares income and expenses with budgeted amounts; the Treasurer's Report reflects the financial standing of the Association as of the last day in the quarter. The Executive Council may amend the budget and approve over-expenditures. When over-expenditures are approved, the original budget should be amended. The line item should be marked and noted as an increase from the original budget so that projections and actual numbers can be compared as the year progresses.
4. Individual Executive Council members are responsible for reviewing and questioning any line items, as appropriate, in the quarterly Budget and Treasurer's Reports.
5. All Executive Council members will act prudently with respect to income and expenditure items over which they exercise control.
6. PASFAA Officers and Committee Chairs are responsible for staying within their budgets. Issues should be reported to the Treasurer and/or President.
7. The Treasurer is responsible for monitoring the budget and alerting Executive Council to serious emerging budget issues as early as possible.

*POLICY UPDATE: Treasurer - July 1999*

*April 2007*

*August 2012*

*February 2013*

*April 2016*

*December 2018*

*June 2023*  
*July 2025*

## **ISSUE: Association Awards**

### **POLICY:**

The Association offers the following awards annually or as appropriate. The selection criteria for each award are described below.

### **PROCEDURES:**

#### ***Life Membership (Honorary Life Membership)***

*May not receive twice.* PASFAA's highest award along with Life Membership, one of the highest awards PASFAA has to bestow upon an individual is the Daniel M. Wray Epic Lifetime Achievement Award. The Life Membership Award is given to individuals who have made an outstanding and sustained contribution to student financial aid. Nominations may be made by any member of the Association. Nominations are reviewed by PASFAA Executive Council (Honorary applies to individuals who are not eligible to be Active (Regular) members of the Association). Life Membership is awarded upon approval by a majority of the PASFAA Executive Council. Given at the annual conference and recognized with a plaque.

#### ***Distinguished Service Award***

*May not receive twice.* Given to individuals who have made significant contributions to PASFAA through leadership, activities, and/or research in financial aid. Recognizes service to our Association over a period of professional involvement, not a single event or activity. Awarded only at such times as a suitable recipient is identified. The Immediate Past President solicits nominations for this award from four (4) immediate past award recipients and submits nominations to Executive Council for review/approval. Approval by a majority of the Executive Council is necessary. This award is not intended as recognition for PASFAA officers for their service in office. Given at the annual conference and recognized with a plaque.

#### ***Leadership Award***

May receive more than once. May be given annually to recognize an individual(s) who has (have) provided outstanding leadership to Association activity in the preceding year. Nominations may be made by any member of the Association. Nominees are reviewed by the PASFAA Executive Council. Recipient(s) must be approved by a majority vote of the Executive Council. (This award is not intended to recognize the President of the Association for her/his year in office.). Given at the annual conference and recognized with a plaque.

#### ***President's Award***

*May receive more than once.* Given to an individual or individuals who worked to provide leadership and/or service to the association over the last year and whose actions have helped to advance the goals and objectives of the association for that period of time. The recipient(s) of the award will be selected by the President and the

recipients will be presented with a plaque at the annual conference.

### ***Retirement Recognition Program***

*May not receive twice* Recognition provided to Active or Associate members who have provided service to students and families, colleagues and their institutions in the area of financial assistance or the financing of post- secondary education. Names may be submitted by any member of the Association. Persons to be recognized must be current members of PASFAA who are retiring within the year.

### ***Emerging Leader Award***

*May not receive twice.* The award will be made to an individual(s) who, within approximately five (5) years of entering the profession, has demonstrated consistent service to and involvement in PASFAA and its projects. Examples of service and involvement include: Committee membership, assistance with the PASFAA Post, presenter or moderator at conference or training programs, etc. Nominees for the award must be current Active (Regular) or Associate PASFAA members. Nominations may be made by any member of the Association. Recipient(s) must be approved by a majority vote of the Executive Council. Given at the annual conference and recognized with a plaque.

### ***Team Award***

*May receive more than once.* The Team Award is given to a PASFAA Committee, task force, special project group or other group that has gone above and beyond in their service to PASFAA during the past year. Nominations may be made by any member of the Association. Recipient(s) must be approved by a majority vote of the Executive Council. Given at the annual conference and recognized with a plaque.

### ***The Daniel M. Wray Epic Lifetime Achievement Award***

*May not receive twice.* Along with Life Membership, one of the highest awards PASFAA has to bestow upon an individual is the Daniel M. Wray Epic Lifetime Achievement Award. Intended for members with at least 15 years of documented accomplishments and sustained high-impact engagement within the association. Individuals may demonstrate eligibility in the following ways: (1) By developing influential tools, events, or frameworks used to advance or sustain the organization; (2) By making meaningful contributions intended to spark volunteerism and engagement; (3) By contributing countless hours and expertise to build or increase sustainability of the association by mentoring others, researching options & opportunities, and/or leading high-return programs. Nominations may be made by any member of the Association. Recipient(s) must be approved by a majority vote of the Executive Council. Award given at the annual conference and recognized with a plaque.

*POLICY UPDATE: President - June 2000  
April 2007*

*April 2016*  
*June 2023*  
*June 2025*

## **ISSUE: Business Partners**

### **POLICY:**

- PASFAA will solicit Business Partnerships for the Association through:
- Cash contributions
- In-kind contributions
- Website and List serve advertising
- Newsletter advertising
- Exhibiting at the Annual Conference
- Other methods, as approved by the PASFAA Executive Council

### **PROCEDURES:**

1. The annual development plan, partnership packages, advertising rates, etc. are approved by the Executive Council as part of the annual budget process.
2. The Finance and Development Committee (Chair-Designee) is responsible for all billing and implementation of Business Partner package details.
3. Business Partner complimentary conference registration will be included in the budget as follows: Total contributions minus membership dues will be listed under revenue. The portion that is membership dues will be put in the budget under membership revenue with a note of the Business Partner names to indicate the amount included in the membership revenue.
4. When presenting at PASFAA trainings, Business Partners will use the ISS Presenter PowerPoint template for presentations. This provides standardization. There are two (2) exceptions when other templates may be utilized; (1) when the training Committee provides a specific template for all presenters or (2) if the Business Partner conducts a sales presentation highlighting their specific product. The template will be provided by the PFAT Chair and ISS Sector Representative.
5. The Pennsylvania Higher Education Assistance Agency (PHEAA) and PASFAA share a common public service mission to support post-secondary education for members of the Commonwealth of Pennsylvania. In recognition of the support PHEAA provides for PASFAA regarding training programs, technical assistance, etc. PHEAA shall receive no more than two (2) additional booth spaces free of charge (space permitting) when they purchase two (2) booth spaces for the purpose of exhibiting at the annual fall conference.

*POLICY UPDATE: Treasurer - July 1999*

*April 2007*

*June 2010*

*October 2013*

*December 2013*

## **ISSUE: Check Authorization and Signing**

### **POLICY:**

The signature of the Treasurer or President is required on all checks written on behalf of the Association. The Treasurer, Treasurer-Elect, and President will be bonded at the time they assume office.

### **PROCEDURES:**

1. No checks are to be written without documentation of the expenses and without written approval from the Council member or Chair responsible for the designated budget line to which the check amount will be attributed.
2. The Treasurer is responsible for paying all bills of the Association. Thus, the Treasurer collects and keeps all documentation (bills, travel vouchers, etc.), enters amounts into the account ledger and prepares checks.
3. The Treasurer Elect is responsible for collecting all income of the Association. Thus, the Treasurer-Elect collects and keeps all related documentation and enters amounts into the account ledger.
4. At the time the Treasurer-Elect takes office, the outgoing Treasurer works with the Treasurer-Elect to change the name and signatory on the PASFAA bank account. The current President's name and signature will also be added to bank records in order for the President to be able to sign checks in an emergency or in the absence of the Treasurer.

*POLICY UPDATE: Treasurer - July 1999  
April 2007  
February 2013  
April 2016  
December 2018  
June 2025  
July 2025*

## ISSUE: Credit Cards for the Association

### POLICY:

The President, President-Elect, Immediate Past-President, Vice President, Treasurer, Conference Chair(s) and EASFAA Representative Designee will receive Association credit cards to use for Association business and travel.

### PROCEDURES:

1. PASFAA credit cards will be provided annually to the President-Elect, President, Vice President, Immediate Past-President, Treasurer, Conference Chair(s) and EASFAA Representative Designee. The spending limits will be set by Council and adjusted as deemed necessary. The current credit card limits are:
  - a. President \$15,000
  - b. President-Elect \$5,000.00
  - c. Immediate Past-President \$5,000
  - d. Vice President \$7,500
  - e. Treasurer \$5,000
  - f. EASFAA Representative Designee (if appointed) \$5,000
  - g. Conference Chair/Chair(s) \$5,000
2. The Treasurer will serve as the primary contact for the PASFAA credit cards.
3. The Expense Report is submitted with the appropriate receipts and signatures of approval from the Council member or Chair responsible for the designated budget line to which the amount will be attributed.
4. If a PASFAA credit card is used for an expense other than our automatic payments linked to the credit card, then an Expense Report must be submitted.
5. A check will be submitted by the Treasurer to the credit card company for the amount billed to the PASFAA credit card.
6. PASFAA credit cards are not to be used for gasoline purchases (gasoline expenses are part of the "mileage" rate paid if traveling by private automobile).

*POLICY UPDATE: Treasurer - April 2007  
March 2010  
February 2013  
April 2016  
September 2017  
June 2025  
July 2025*

## **ISSUE: Complimentary Rooms at the Annual Conference**

### **POLICY:**

The annual conference hotel contract generally will include complimentary rooms as part of the package. Complimentary rooms are distributed according to the procedures outlined below:

### **PROCEDURES:**

1. The Chair(s) of the annual Conference Committee is responsible for assigning complimentary rooms in the following order:
  - a. President
  - b. Conference Chair(s)
  - c. Special guests whose rooms would otherwise be paid for by the Association (ED Representatives, EASFAA President, etc.)
  - d. The President assigns remaining complimentary rooms.

*POLICY UPDATE: Conference Chairperson - July 1999  
April 2007  
February 2013  
February 2019*

## **ISSUE: Conference and Spring Training Registration Policy and Fees**

### **POLICY:**

The registration fee for the annual Conference and Spring Training is established by the PASFAA Executive Council.

### **PROCEDURES:**

1. The fee recommendation, together with supporting documentation, is made by the Finance and Development Committee and brought to Council by the Chair.
2. The financial objective is that the annual Conference and Spring Training break even.
3. The fee decision for the Conference should be made no later than the June meeting and for Spring Training, no later than the December meeting of the PASFAA Executive Council.
4. The fee is used to cover expenses related to the actual Conference and/or training. The fee does not cover the room of the attendees; expenses for rooms, although contracted by the Association for the attendees, are paid individually by attendees.
5. The Conference may be planned to include most of the meals during the Conference so attendees do not have to eat at an additional expense, with the exception of commuters who have the option to purchase meals at their own expense.
6. There should be a comprehensive fee for the full Conference. In addition, a daily fee will be available for those who do not attend the full Conference. Care should be exercised, however, so that a daily fee does not reduce comprehensive fee registrations.
7. The Spring Training fee will be for the one (1) day workshop and include meeting rooms, training materials, and lunch.
8. All participants and PASFAA presenters are required to register and pay the registration fee. If the participant and/or presenter would normally be a PASFAA member, they are also required to pay membership dues. The Treasurer may waive one (1) registration fee for members required to attend multiple training sites. Members will be reimbursed for travel expenses when volunteering on the opposite side of the state.
9. Any sponsor/vendor package that includes complimentary fees must be included in the budget projections.
10. PASFAA does not bill for the Conference or Spring Training fees. PASFAA accepts credit cards for payment of registration fees.

*POLICY UPDATE: Conference Committee Chair(s), Finance and Development  
Committee Chair(s) - July 1999  
April 2007  
March 2010  
February 2013  
February 2015*

*April 2016*  
*June 2025*

## **ISSUE: Conference Site Selection**

### **PURPOSE**

Recommend to Council specific hotel options and facilities for conducting the annual Conference.

### **PROCEDURES:**

1. Immediate Past President, past conference chair(s) and/or other Council Designee visit hotels and conference facilities as potential conference sites. A minimum of one (1) site and a maximum of three (3) sites may be visited.
2. Conference site should alternate between east, west, and central Pennsylvania.
3. Gather specific comparative data on the adequacy of the conference facilities, October availability, number and cost of rooms, cost of food, other ancillary costs for such services as technical support and other specific contract terms.
4. Use a consultant in the process as appropriate.
5. Provide expense forms to the Treasurer for all expenditures incurred during the site selection process.
6. The Immediate Past President and past Conference Chair(s) advise the President for future site selection to present to Council for vote.
7. President and Treasurer signs all contracts on behalf of the Association.
8. Should select conference sites at least three to five (3-5) years in advance.

*POLICY UPDATE: President, Immediate Past President - July 1999  
April 2007  
February 2013  
February 2015  
April 2016  
September 2017*

## **ISSUE: Contracts**

### **POLICY:**

PASFAA has several regular contractual obligations which are entered into according to the following policies:

### **PROCEDURES:**

1. The Treasurer and Treasurer-Elect recommend a contractual relationship with an auditor. The PASFAA Executive Council approves the contract and the President and Treasurer signs the agreement.
2. The annual Conference Site Selection is recommended by the Immediate Past President and past Chair(s) of the Conference Committee. The Council approves the site and terms and conditions. The President signs the agreement and Treasurer co- signs the agreement, if applicable.
3. A number of minor contractual matters arise annually in planning the annual Conference (ex: keynote speakers, entertainment companies, etc.). The Conference Chair(s) is/are responsible for negotiating those ancillary arrangements, which are signed by the President and (if applicable) the Treasurer.
4. Other contractual matters that may arise from time to time, including Spring Training sites, should be brought to PASFAA Executive Council for discussion. Generally the entire Council will discuss and decide. In rare cases, the President may obligate the Association with the advice and consent of the Council.
5. No member of PASFAA has the authority or responsibility to contractually bind the organization without Council approval and signature of the President and (if applicable) the Treasurer.

*POLICY UPDATE: President - July 1999*

*April 2007*

*April 2013*

*September 2017*

*December 2018*

*June 2025*

## **ISSUE: Denial of Membership and/or Business Partnership**

### **POLICY:**

PASFAA reserves the right to refuse membership and/or Business Partner arrangements to PASFAA sponsored activities or events.

### **PROCEDURES:**

1. Membership and business partnerships are open to all individuals and organizations that support the mission and goals of our association. PASFAA reserves the right to deny membership to the association and/or the ability to partner with PASFAA on any event.
2. Any denial, limitation or restriction will be determined by PASFAA Executive Council upon recommendation by the President, Treasurer or Council member.

*Policy Adopted: Executive Council - September 2006*

## **ISSUE: EASFAA Training Assistance**

### **POLICY:**

- PASFAA will support EASFAA's training in Pennsylvania. PASFAA will not provide financial contribution. EASFAA provides the presenters, materials, refreshments, on-line registration, and on-site housekeeping.
- The PFAT Chair will assist with site selection and local coordination with EASFAA.
- The PFAT Chair will forward EASFAA training announcements to the PASFAA Website Coordinator for blast-posting to membership.

*Policy Adopted: Executive Council - September 2013  
February 2015  
February 2019*

## **ISSUE: Methods of Communicating Electronic Messaging**

### **Blast E-mails**

#### **POLICY:**

PASFAA "blast emails" are used on a limited basis and approved by PASFAA's Website Representative.

#### **PROCEDURES:**

1. PASFAA utilizes "blast emails" as a means for communicating time-sensitive information among the entire membership. PASFAA Council and PASFAA Committees utilize blast emails as a primary means for announcing programs, services, job announcements, and for soliciting participation and feedback.
2. In order to maintain the effectiveness of blast emails as a communication tool, the use of this tool by individual members has limitations.
3. Requests by members for information to be communicated via a blast email should be directed to PASFAA's Website Representative. Communications from individual members are limited to those that announce information appropriate to the entire membership including federal and state aid training announcements. PASFAA blast emails should not be used for personal announcements.
4. PASFAA blast emails may not be used to share individual opinions or to announce products and services of individual members or their institutions/organizations. PASFAA reserves the right to decide which blast email requests will be approved or denied.

## **Posting of Calendar Events**

### **POLICY:**

The Technology Committee will oversee the PASFAA calendar. All Committee Chairs, Council members, and Sector Representatives are invited to post trainings and meetings.

### **PROCEDURES:**

See instructions posted on the PASFAA website.

## **Social Media; Facebook, X (Twitter), LinkedIn**

### **POLICY:**

- To increase communication with members, PASFAA will maintain a social media presence.
- To include, but not be limited to, Facebook, X (Twitter), LinkedIn.

### **PROCEDURES:**

1. Official contributors will be members of the Communication Committee; others can be assigned by the President and Communications Chair. The Technology Committee may also be involved.
2. The Website Coordinator must pass on administrative rights annually to the new Chairs.
3. All postings and pictures must present PASFAA and our members in a positive, professional manner. Pictures of alcohol are not permitted.
4. All Chairs are encouraged to advertise and compose updates for their Committees.

*Policy Implemented: - April 2007  
February 2015  
February 2019*

## **ISSUE: Entertainment Policy**

### **POLICY:**

PASFAA will make every effort to ensure that entertainment provided at the conferences and other events is reflective of the professionalism of PASFAA. This policy applies to music, DJs, comedy acts, and all entertainment provided as part of the PASFAA event.

### **PROCEDURES**

It is the responsibility of the Committee Chair(s) and/or PASFAA Council to adhere to this policy.

*POLICY: December 2018*

## **ISSUE: Incorporation, Private Non-profit**

### **POLICY:**

PASFAA will maintain its status as a private non-profit entity incorporated in one (1) of the jurisdictions within the Commonwealth of Pennsylvania.

### **PROCEDURES:**

1. The Association has been permanently incorporated in Pennsylvania as a private non-profit entity since September 21, 1979.
2. It is the responsibility of the Treasurer to see that the Association maintains its status.
3. As necessary, the Treasurer (and, if necessary, the Treasurer-Elect) will work with the auditor CPA to accomplish whatever filings are necessary to maintain the status.
4. PASFAA must file a Form 990 & 990-T tax return annually. The auditor prepares the Form 990 & 990-T tax returns as part of the annual audit process.

*POLICY UPDATE: Treasurer - July 1999  
April 2007  
June 2014  
April 2016  
December 2018*

## **ISSUE: Investment Policy**

### **POLICY:**

PASFAA resources are to be invested to *maximize* the rate of return as well as security and liquidity. The goals of this policy are: stability, strength, conservative growth, steady earnings and an acceptable level of liquidity.

### **PROCEDURES:**

1. Resources are to be invested to maximize returns while still protecting principal. The investments do not need to be guaranteed or insured but should be conservative and have a substantial history for reliability. Such things as insured CD's, commercial paper, money market funds, short-term government bonds (such as 91-day, 6 month and 1 year Treasury Notes and Mutual Funds) and investments in international markets are ideal for consideration. Also acceptable are US equity and international equity mutual fund positions of a conservative nature.
2. The Treasurer and the Treasurer-Elect are responsible for estimating the cash flow needs of the Association. The Treasurer, the Treasurer- Elect, and the Financial Advisor review the amounts of money available for investment and the lengths of the investments and present to Council to approve.
3. The PASFAA Executive Council is responsible for approving the Association's investment strategy and should review and approve the strategy at least annually (and more often if economic conditions warrant).
4. The Treasurer and Treasurer-Elect are responsible for implementing the approved investment strategy, using professional advice and assistance as necessary.
5. The Finance & Development Committee will annually review with a representative of an investment firm for advice and discussion of possible modification of goals and strategy.

### **STRATEGY:**

(Over a five year period, beginning in 1999, PASFAA aimed to have total investments equal to 50% of the annual operating budget.) Beginning in 2007 PASFAA aims to have total investments equal to 150% of average annual operating expenses over the complete immediate past four (4) years. This strategy would involve a mixture of investments.

*POLICY UPDATE: Treasurer - July 1999  
April 2007  
April 2008  
June 2014  
April 2016  
December 2018  
June 2025*

## **ISSUE: Membership Dues**

### **POLICY:**

- Membership dues are established annually by recommendation of the Finance and Development Committee and approved by the PASFAA Executive Council.
- Membership is available on an individual basis (all classifications) or institutional basis (for Regular and Associate classifications). Institutional Membership is intended to serve as an incentive to expand PASFAA membership to more staff members by providing group discount for PASFAA members who work for the same employer and have five or more staff who want to become PASFAA members.
- An eligible person (defined in Article III, Section 1 of the Constitution) may register for their own membership by completing the membership application on the PASFAA website. If an “individual member” loses their eligibility for Active (Regular) membership as defined in the By-Laws because of a change in employment or other such circumstances, they lose the right to vote. However, the person maintains Associate membership status for the balance of that annual membership year. Dues are not refunded.
- Eligible higher education institutions and related organizations (defined in Article III, Section 1 of the Constitution) may purchase an Institutional membership for five or more staff to be registered on the PASFAA website as Associate and/or Active (Regular) members for the membership year. In the case of institutional membership (limited to Associate and Active (Regular) member classifications), that membership is owned by the institution and not individual employees. If an individual who is registered via an Institutional Membership in a given year leaves said employer, their membership is terminated immediately. An employee who leaves that institution/organization would be required to complete a new membership application (and pay any related membership fee) as a new employee of a second PASFAA member school or organization if within the same membership year as defined in Article I, Section 3. The individual may choose to register as a new “Individual Member” and will be required to pay the then-current membership fee for an individual membership with the Association. If their new employer has purchased an Institutional Membership for the current membership year, this member can be added to the new employer’s list via the PASFAA website and Treasurer.

## **PROCEDURES:**

1. Membership classifications are determined, as necessary, by the Immediate Past President.
2. Persons with individual memberships may change their title and institutional affiliation during the membership year.
3. Once paid, individual memberships belong to the individual, not the institution, regardless of who paid the dues. This statement should be printed on all forms soliciting membership dues.
4. Once paid, institutional memberships belong to the institution, not the individual, regardless of who paid the dues. This statement should be printed on all forms soliciting membership dues.
5. Annual dues are not refundable. This should be printed on all forms soliciting membership dues.
6. Annual dues (Individual and Institutional) are listed in the minutes of the Executive Council meeting in which the annual budget is approved, and published on the Conference registration form and the membership application. Individual membership dues are paid either as part of the annual Conference registration or separately with the completion of the annual membership application. Institutional membership dues are paid with the completion of the annual membership application.
7. PASFAA does not bill for membership dues. PASFAA accepts credit cards for membership dues.
8. The Treasurer is responsible for implementing these procedures.
9. The Treasurer-Elect is responsible for depositing dues and maintaining financial records of payments.

*POLICY UPDATE: Immediate Past President - July 1999*

*April 2007*

*April 2016*

*September 2017*

## **ISSUE: PASFAA Student Scholarships**

### **POLICY:**

- The PASFAA Student Scholarship was created to help the population to whom we dedicate our careers, and to promote PASFAA within the higher education community.
- The PASFAA Scholarship is made possible by the Association and generous donations from members. The Conference Committee may raise funds for the scholarship as the annual charity. If funding level in the budget and fundraising falls below the amount needed to distribute, funding may be taken from the PASFAA reserves.
- The scholarship will award a maximum amount of \$1000 to each recipient. The minimum amount cannot fall below \$500.
- Each Sector will have the opportunity to receive one (1) scholarship per year. If no application is received for a Sector, no money will be assigned.

### **PROCEDURES:**

1. A Scholarship Chair will be named by the President and approved by the Executive Council to serve for one (1) year.
2. The Chair will update the application and website. They will also notify schools through e-mail blasts, Facebook, X (Twitter), etc. of the availability of the new application.
3. Applications will be submitted to the Chair who will sort by Sector.
4. Each Sector Representative will name a "Scholarship Reader".
5. After deadline, the Chair will forward one (1) Sector's application to a reader from another Sector.
6. The reader will choose one (1) winner. The reader may enlist others to help with the reading but only one (1) application may be selected.
7. Scholarship winners will be selected based on their academic achievement and the content of their written statements.

**TIMETABLE:**

- May 1
  - Deadline for returning applications to Committee Chair.
- June 1-31
  - Review and selection of scholarship recipients.
- October
  - Announcement at the Conference and presentation of awards.
  - Treasurer mails letters and checks to any schools not present at the conference.
  - Post names of winners (and school) on the PASFAA Website and Facebook.

**STUDENT ELIGIBILITY:**

- All students applying for the PASFAA Scholarship must meet all of the following requirements:
  - Pennsylvania resident (per PHEAA's State Grant guidelines).
  - Enrolled at least half-time, in a degree-seeking program in a post-secondary institution of higher education OR a diploma/certificate program in the Nursing or BT&T Sector only.
  - Have a minimum GPA of 3.0 from a post-secondary institution of higher education.
  - Have completed thirty (30) credits or the hours equivalent from a post-secondary institution of higher education at the time of application.
  - Scholarships are non-renewable, but students are welcome to reapply each year.
  - Preference will be given to applicants attending schools that are part of the PASFAA membership.
  - No more than one (1) scholarship per year will be given to each of the following sectors: Business Trade & Technical, Nursing, Private Four (4) Year, Public Two (2) Year, PASSHE, State- Related and Graduate Schools.
  - Deadline to apply is May 1<sup>st</sup>.

**DISTRIBUTION OF FUNDS**

- PASFAA will mail checks to student winners. Winners must supply their social security number for year-end tax information.
- The Financial Aid Office must verify that the student is enrolled and in good academic standing. This scholarship is designed to reduce debt – it is not to be used by the institution to replace or reduce grant or other scholarship funds
- If the student withdraws from the school prior to the scholarship funds being applied to his/her account, all scholarship money must be returned to the PASFAA Scholarship fund.

*POLICY: February 2014  
February 2015  
April 2016  
June 2025*

## **ISSUE: Refund Policy**

### **POLICY:**

Under certain circumstances, established by the PASFAA Executive Council, the Conference registration fee is refundable. The refund policy should be stated on all registration forms.

### **PROCEDURES:**

Refunds for specific trainings:

- a) PASFAA will refund the full conference fee if the Treasurer is notified in writing more than 14 days before the beginning of the Conference. A cancellation fee of 50% will be assessed if the Treasurer is notified in writing 7-14 days before the beginning of the Conference and 75% if the Treasurer is notified in writing less than 7 days prior to the Conference. Cancellation fees are not refundable. If a Conference registrant who has not made payment fails to attend the Conference and has not notified the Treasurer in writing, they will be responsible for the full Conference fee and any late fees, if assessed, but not for a cancellation fee. No refunds will be given after the opening day of the Conference. Membership dues are retained in the event of a refund of Conference fees. Transfer of Conference fees are permitted, but dues are assessed by individual membership. Membership dues are not refundable or transferable. Extenuating circumstances are serious situations which preclude the registrant from attending the Conference and include death within the immediate family, hospitalization of the registrant, car accidents, personal injury, and family emergencies, which may be reviewed and approved by the Treasurer in consultation with the President. Extenuating circumstances not outlined here will be reviewed for refund on a case-by-case basis and approved by a majority vote of Executive Council.
- b) PASFAA will refund the Spring Training Fee in full more than 7 days before the event if the Treasurer is notified in writing. A cancellation fee of 50% of the registration fee will be assessed if the Treasurer is notified 3-7 days prior to the training. No refunds will be given for cancellations received less than 3 days before training. If a registrant who has not made payment fails to attend, they will be responsible for the registration fee in full. Membership dues are retained in the event of a refund of training fees. Membership dues are not refundable or transferable. Extenuating circumstances and associated refunds are the same as outlined in Section 2a above.
- c) PASFAA will refund the Don Raley Institute Training Fee in full more than 7 days before the event if the Treasurer is notified in writing. A cancellation fee of 50% of the registration fee will be assessed if the Treasurer is notified 3-7 days prior to the training. No refunds will be given for cancellations received less than 3 days before training. If a registrant who has not made payment fails to attend, they will be responsible for the registration fee in full. Membership dues are retained in the event of a refund of training fees. Membership dues are not refundable or transferable. Extenuating circumstances and associated

refunds are the same as outlined in Section 2a above.

*POLICY UPDATE: Treasurer - July 1999*

*April 2007*

*March 2010*

*April 2016*

*June 2016*

*September 2017*

*December 2018*

*February 2019*

## **ISSUE: Reprint Permission**

### **POLICY:**

It is the policy of PASFAA to grant reprint permission, without charge, to authors and publications who contact us asking for permission to reprint.

### **PROCEDURES:**

1. Any request for permission to reprint from PASFAA materials should be forwarded to the President.
2. The President shall write authorizing reprint permission, without charge, and cautioning the author/publisher that it is important to cite PASFAA as the source.
3. The President shall copy the Secretary for the record.

*POLICY UPDATE: Newsletter Editor, President  
July 1999  
April 2007  
June 2025*

## **ISSUE: Tax Exempt Status**

### **POLICY:**

PASFAA will maintain its federal tax exempt status by complying with all pertinent regulations (PASFAA is NOT STATE TAX EXEMPT).

### **PROCEDURES:**

1. The Treasurer is responsible for seeing that the Association maintains its federal tax exempt status.
2. The certified public accountant employed by PASFAA is responsible for filing necessary forms, reports, etc. to maintain our status and for advising the Association of any issues in this regard.
3. PASFAA's tax exempt status is permanent provided federal tax returns are filed in a timely fashion.
4. Our federal tax ID # is 23-2126452.

*POLICY UPDATE: Treasurer  
July 1999  
April 2007  
June 2025*

## **ISSUE: Travel Expense Reimbursement**

### **POLICY:**

- Active (Regular) or Associate PASFAA members traveling on PASFAA business (Council or Committee business) are entitled to reimbursement of necessary and documented travel expenses. Members are not entitled to travel expense reimbursement for participation in the annual Conference. Participation in the annual Conference by PASFAA aid professionals is considered a professional responsibility.
- Non-PASFAA members are entitled to reimbursement of necessary and documented travel expenses for approved participation in official PASFAA activities as approved by the President and/or Treasurer.
- PASFAA covers the expense for the EASFAA Representative to attend EASFAA required meetings if the expense is not covered by EASFAA.
- PASFAA covers the expense for two Council Members, as selected by the President and approved by Council to attend the NASFAA Leadership Conference. If two Council members are not available to attend, the President may instead select one or more PASFAA Committee Chairs (up to two total) to attend, subject to Council approval.
- PASFAA covers the expense of the EASFAA Representative (typically the Past-President) to attend the annual EASFAA Conference, if the expense is not covered by the individual's school.
- Expenditures for EASFAA events will be covered for the normal elements related to conference attendance (registration fee, travel and hotel accommodations for the nights of the conference).
- Expenses beyond normal parameters (e.g. an extra night due to cost effectiveness to travel the day before the start of the conference or to be able to attend a special session/meeting) are possible after discussion with the Treasurer and/or President, if deemed necessary, Executive Council.

## **PROCEDURES:**

1. Because of the travel expenses involved in all PASFAA activities, Committee Chair(s) should schedule meetings, events, workshops, etc. to minimize travel costs. For example, use conference calls, schedule meetings centrally so people can drive rather than fly, schedule meetings in areas where more than one (1) participant lives, so travel and hotel costs are minimized, schedule meetings well in advance in order to take advantage of low air fares, etc.
2. Travel costs are reimbursed as stated in the PASFAA Travel Reimbursement Guidelines.
3. PASFAA does not cover expenses for Executive Council members, such as travel to the annual Conference, with the exception of the Complimentary Room policy.
4. The Treasurer is responsible for ensuring that travel expense reimbursement forms and copies of the Guidelines are available on the PASFAA website and that all members of the Executive Council and Committee Chairs are aware of the forms and guidelines. Copies may be given to Committee Chairs for distribution to Committee members.
5. All requests for reimbursement are to be submitted to Committee Chairs for counter-signature and to the Treasurer for payment. Committee Chairs are responsible to see that only legitimate and documented expenses are claimed.
6. Reimbursement policies are to be explained to people being asked to serve PASFAA if their travel costs are to be reimbursed by virtue of their position.

*POLICY UPDATE: Treasurer- -November 2000  
April 2007  
February 2015  
April 2016*

## **ISSUE: Travel Reimbursement Guidelines**

### **POLICY:**

Travel and business expenses incurred while carrying out PASFAA business will be reimbursed according to set procedures.

### **PROCEDURES:**

1. The following guidelines have been prepared to help identify legitimate travel and business expenses incurred while carrying out PASFAA business, and to establish procedures for reimbursing eligible people. These guidelines should be explained to all PASFAA Executive Council members and to Chairs of PASFAA committees.
2. It is necessary to state that PASFAA's financial resources are limited. All persons acting on behalf of PASFAA are asked to exercise reasonable economy. Any person submitting a PASFAA Expense Report for payment must understand that expenses reimbursed by a party other than PASFAA may not be included on the PASFAA Expense Report.
3. Persons seeking reimbursement must submit a PASFAA Expense Report to the Committee Chairs and/or President. All itemized receipts must be attached. Once approved and signed by all parties, the Report will then be forwarded to the Treasurer for payment.
4. Expenditures that total more than \$500 must be signed by the President.
5. Committee Chairs are charged with assuring that PASFAA funds are spent reasonably.
6. In any instance where a request does not comply with the guidelines (listed below), or where the reasonableness or appropriateness of the request is in question, the Treasurer will submit the request to the President for review. The President may seek the approval of the Executive Council.
7. The Executive Council reserves the right to refuse to honor any request that does not comply with the intent of these guidelines.

### ***Travel***

- Travelers seeking reimbursement must select a mode of travel based on the economical use of time, cost, weather and other requirements of the trip.
- Air reservations should be made as early as possible in order to take advantage of lower rates.
- Reimbursement for air travel will be for economy class only.
- Travel by private vehicle will be reimbursed at the standard Federal reimbursement rate for mileage. All related parking and toll charges will be covered if receipts are presented with the Expense Report. Expenses related to traffic violations, including illegal parking, will not be reimbursed.
- Reimbursement will not cover the cost of insurance or any liability associated with an accident.
- Exceptions to the above restrictions should be granted in advance, when possible, by the Committee Chair.

- Reimbursement for use of a rental car will be acceptable. However, a cost comparison between a private or rental car should be considered.

### **Hotel Accommodations**

- Hotel accommodations for PASFAA Executive Council meetings will be made in advance by one (1) person, usually the President.
- Hotel accommodations for any other PASFAA business must be approved in advance by the Committee Chair.

### **Meals**

- If meals are provided (i.e. the full meal plan or the American plan at a hotel or by PASFAA during meetings), other eating arrangements will be a personal expense.
- Meals directly related to PASFAA travel will be reimbursed. Meals/food allowance would be reimbursed by receipt, which will not exceed the federal per diem rate, for all PASFAA business.
- Persons are asked to exercise reasonable economy when ordering meals.
- Alcoholic beverages will not be reimbursed.
- Members coming in the evening prior to the scheduled meeting are responsible for their own meal that evening. The exception to this is for the Membership and Association Governance Committee; if they meet Sunday evening their meal is provided or reimbursed.
- Any Committee that meets for two (2) consecutive days will have the meals between the days provided or reimbursed.

### **Tips**

- Reasonable tips to hotel and transportation personnel will be reimbursed. Tips for meals should be included in the costs of meals and should not exceed 20%.

### **Other Expenses**

- Certain other expenses incurred by members including, but not limited to, printing, mailing, and telephone and Internet expenses, may be reimbursed upon submission of an itemized statement on the Expense Report.
- Expenses greater than five hundred (500.00) dollars must have had prior approval by the President.
- Reimbursement may be made to the individual or institution as appropriate.

*POLICY UPDATE: Treasurer Adopted: September 27, 1979*

*Revised: October 25, 1989*

*December 2, 1990*

*April 11, 1994*

*April 2007*

*April 2013*

*February 2015*

October 2015  
April 2016  
June 2016  
February 2019  
June 2025

## **ISSUE: Use of Images of PASFAA Members and Functions**

### **POLICY:**

This policy is designed to address the use of images of PASFAA members that may be taken at various formal and informal PASFAA events.

- Generally, the use or display of such images in various PASFAA media is permitted without prior approval of the person where the person appears in the background of an image where they are not the topic in question or where they have actively posed for the image. In the case of a candid image where the person is of subject interest, permission to use the image will be assumed.
- At no time is a picture showing alcohol acceptable and should not be posted anywhere.

### **PROCEDURES:**

1. The following should appear on all PASFAA membership materials: "In applying for membership, I understand that my image may be attained and utilized in various PASFAA media."
2. The following should appear in conference or other event registrations: "Please note that photographs may be taken at this event and displayed in various PASFAA media. Those participants that pose for photographs are permitting the use of their image in this way."
3. Policy will be stated on Home Page of PASFAA website and the Policy and Procedures Manual.

*POLICY ESTABLISHED: Executive Council - April 2014  
February 2015  
April 2016  
June 2025*

## **ISSUE: Volunteer Selection at Annual Conference**

### **POLICY:**

All Active (Regular) or Associate Members will have an opportunity to volunteer for all Committees for the upcoming year at the annual Conference. This procedure will be implemented in conjunction with the annual electronic volunteer solicitation.

### **PROCEDURES:**

1. Council members will staff a PASFAA Booth at the annual Conference. The schedule will be organized by the President-Elect.
2. This booth will contain, but is not limited to, Committee descriptions and volunteer sign-up sheets.
3. Afterwards, the Secretary will tally the sheets and forward the names/contacts to each Committee Chair.
4. It is recommended that at least half of each Committee's volunteers be selected from this process. The Chair will contact each person, whether selected or not.
5. In most cases, the Committee members will not be voted on until the December Council meeting.

*POLICY UPDATE: June 2014  
April 2016  
June 2025*

## **ISSUE: Voting Policy**

### **POLICY:**

Election of Officers and Executive Council members shall be conducted under the supervision of the Membership and Association Governance Committee and shall be by plurality of Active members voting.

### **PROCEDURES:**

1. Regular Balloting - shall take place in the summer prior to the annual Conference of the Association. Balloting shall take place so that the election results can be announced no later than August 15.
2. Voting shall be conducted electronically.
3. Electronic voting should be available to members for at least 15 days. Absentee balloting is not available with the electronic voting process.
4. Tie-Breaker - In the case of a tie for (the position of) any office or Council members, the tie shall be resolved by the current President, President-Elect, and Immediate Past-President casting the tie-breaking votes by secret ballot. The tie-breaker votes will be counted by the Secretary.

*POLICY UPDATE: Immediate Past President - July 1999*

*April 2007*

*April 2016*