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## *I. Introduction to Policies & Procedures Manual*

### **Purpose**

The purpose of the OASF<sup>AA</sup> Policies & Procedures Manual is to provide guidance and information to the officers and members of the Association regarding the history, composition, function and operation of the Association.

### **Content**

The content of the OASF<sup>AA</sup> Policies & Procedures Manual is based on the SWASF<sup>AA</sup> Policies & Procedures Manual and will be revised and updated as needed.

### **Use**

The Board of Directors and any other standing or ad-hoc committees will use the manual as a basis for their operations.

### **Revisions**

The President-Elect is responsible for updating the Policy and Procedures Manual and for distribution of the Manual to new Board members and committee chairs. Each committee chair is responsible for reviewing and updating the descriptions, policies and functions section of the Policies and Procedures Manual for his/her committee at the end of his/her term as chair and communicating any changes to the President-Elect.

### **Revision Date**

Last Revised-January 2018

## *II. Board of Directors*

### **Meetings**

The President schedules meetings, usually at intervals of one month to two months during the year. Robert's Rules of Order are used as the determinant of appropriate motions and voting procedures for all OASF<sup>AA</sup> meetings.

### **Agendas**

The President is responsible for drafting and printing the agenda for the meeting.

### **Location of Meetings**

The President determines the location of meetings; at least one meeting is held at the conference site prior to the conference to finalize conference setup.

**Meeting Minutes**

Minutes of board meetings should be prepared by the Secretary and distributed to the Board members prior to the next meeting.

**Executive Committee of the Board**

Voting members of the Board are the President, President-Elect, Past President, Secretary, Treasurer, Treasurer-Elect, and two Delegates-at-Large.

**Votes by Conference Call, FAX, or E-mail**

In the course of conducting OASF AA business, it may be necessary and expedient for the Board of Directors to consider and vote on items of business via conference calls, FAX, or E-mail. Business so transacted will be reported at the next scheduled Board of Directors meeting. If a conference call is used to transact business that requires a vote, the Secretary, or other appointee in absence of the Secretary, will record minutes. Votes taken by FAX or by E-mail (or a combination thereof) will be documented. The documentation of the vote will be provided to the Secretary for inclusion into official association records.

***III. Membership***

Beginning July 1, 2009, membership in the Oklahoma Association of Student Financial Aid Administrators will be based upon annual payment of dues. These dues will be set every year by the Executive Board and will be announced to the membership accordingly.

**Institutional Membership Defined**

Institutional members are schools that engage in the education and/or training of students at the post-secondary level in the state of Oklahoma. Upon payment of annual dues, institutional members will be considered a member in good standing and will be allowed one voting representative. The voting representative must be a person actively and directly engaged in the administration of student financial aid at the institution. The institutional voting representative, as well as other financial aid professionals from the member institution, will be entitled to attend association meetings at the member rate, to hold office, and to serve on committees.

Paid membership dues will allow for a lower conference registration rate than the conference rate that will be assessed to non-members. Other training opportunities, such as Decentralized Training and Support Staff Training, have previously been offered at no cost to schools. Non-members may be faced with the possibility of paying registration fees for attendance at forthcoming training opportunities.

**Associate Membership Defined**

Associate memberships can include representatives of state and federal government agencies, foundations, banks and other financial institutions, guarantee agencies, and private and community organizations interested in student financial aid matters. Associate members are not entitled to vote on matters brought before the Association.

Associate members may be charged lower conference registration and/or exhibit fees than non-members who wish to attend and/or exhibit at the annual OASF AA conference.

**Annual Letter and Membership Application**

Every fiscal year, beginning July 1, the Treasurer is charged with collecting renewed membership applications. The membership application, accompanied by a letter explaining the nature of the application, will be sent to the Directors of Financial Aid offices at higher education institutions across the state and those seeking associate membership, such as lenders, guarantee agencies, and other who would not qualify for institutional membership. The letter and application will be sent either via email or by mail, as per the preference of the Treasurer. The letter explains the benefits of membership, as outlined above. The application allows for the designation of the institution's voting representative and the listing of other financial aid professionals in the office.

Reminder letters will be sent in September. These will simply remind those who have not yet paid of the benefits they could be forgoing by not paying the membership dues.

**Payment and Receipt Procedures**

A directory will be created to track membership and payment. When payment is received, this directory will be updated to list the voting representative of the particular institution and the additional members will be listed as well. This will keep a current record of institutions and members in good standing. For members who have noted on the application that a receipt is necessary, a receipt, to indicate the payment received, will be sent to the institution or organization.

**Benefits of Membership**

Every year, the Executive Board will set the membership fee. While doing this, they will also establish the benefits of membership. Training opportunities have previously been offered free of charge to school participants. Events such as Support Staff Training and Decentralized Training may no longer be offered at no cost to attendees. If payment for attendance is required, a fee may be set for members and a higher fee may be set for non-members. Also, conference registration rates may be set at a particular rate for members, while non-members may be charged a higher rate for attendance. Conference registration rate tiers would apply to associate members and those offered associate membership but choose not to accept it and pay membership dues.

***IV. Detailed Officer Descriptions*****President****Basic Function**

The President acts as the chief executive officer of the Association, presiding at all meetings of the Association and chairing all meetings of the Board of Directors.

**Characteristic Duties and Responsibilities**

Provides leadership and direction to all activities of the Association, the Board of Directors, and all standing and ad-hoc committees and task forces of the Association.

Serves as the official representative of the Association and the Board of Directors, or delegates such responsibilities to another officer or member of the Board as may be deemed necessary from time to time.

Serves on the Board of Directors of the Southwest Association of Student Financial Aid Administrators (SWASF AA). The OASF AA President begins SWASF AA Board service on January 1 and continues until December 31. This arrangement ensures that the same OASF AA individual serves on the SWASF AA Board for the duration of a SWASF AA President.

Attends all SWASF AA Board meetings (3-4 per year) to represent the interests of the OASF AA Board of Directors and membership, provides reports and information requested by the SWASF AA Board of Directors, and shares news on behalf of OASF AA.

Attends the SWASF AA annual conference and represents the interests of OASF AA. Makes arrangements for the traditional SWASF AA gift (typically around \$50) provided for the specified purpose of the Conference Committee.

Serves as the official spokesperson of the Association and the Board of Directors, or delegates such responsibility to another officer or other Board member as deemed necessary from time to time.

Calls and presides at all meetings of the Association and the Board of Directors, determines length of floor debate, manner of voting, and agenda items. Appoints meeting parliamentarian.

Appoints and dismisses all committees subject to confirmation by the Board of Directors.

Directs the filling of vacancies on the Board of Directors as specified in the By-Laws.

Serves as ex officio member of all Association committees and task forces.

The President is responsible for recognizing those who have been chosen by OASF AA to receive an Award or are being honored for service to OASF AA. It is the decision of the President as to whether he/she presents a plaque or a gift that would better fit the personality of the recipient. The presentation will be made by the President or the President's designee at the conference.

Submits an annual report to the Association on all matters of interest or concern to the Association members, which have taken place during that term of office.

Maintains the following records, documents or items:

- The OASF AA banner (flag) and displays it at all OASF AA and SWASF AA conferences
- Copy of the Articles of Incorporation, Constitution, and By-Laws
- Copy of the Policies and Procedures Manual
- President's gavel
- Organizational logo (copy ready for printing purposes)
- List of current members
- List of current office holders
- List of current committee chairs
- Copy of current budget

Length of office

The President shall serve as CEO of the Association for one year commencing July 1.

**President-Elect**Basic Function

The President-Elect shall perform the duties of the President in the event of absence or incapacity of the President to serve; shall chair the Advisory Committee; shall perform such duties as are assigned by the President or prescribed by the Board of Directors; and shall prepare for his/her term of office.

Characteristic Duties and Responsibilities

Serves as a voting member of the Board of Directors, attends all meetings of the Board.

Appoints chairs of all committees for the following year, except for the Nominations/Elections, Long Range Planning, and Advisory Committees. When possible, the chairs will be selected from current year committee members.

Traditionally is selected by the President to serve as the meeting parliamentarian.

Responsible, in conjunction with the Past-President, for updates to the Policy and Procedures Manual and for distribution to the Electronics Initiatives Chair for posting to the OASFAA website.

Calls and presides at all meetings of the Advisory Committee; develops agenda items; appoints a recording Secretary of the Committee; reports the recommendations of the Committee to the President and Board of Directors; and submits an annual report to the President.

Attends the NASFAA Leadership Conference, typically held in late February, on the Association Management track; and participates in the Hill Visits at the end of the conference.

Maintains and updates the following records or documents:

- Copy of Articles of Incorporation, Constitution and By-Laws
- Copy of Policy and Procedures Manual
- Copy of agendas and minutes of Advisory Committee covering the current and previous year
- List of current office holders
- List of current Advisory Committee members
- Robert's Rules of Order, Revised

Performs other functions as assigned by the President or prescribed by the Board of Directors.

Length of office

One year commencing July 1.



## Treasurer

### Basic Function

The Treasurer shall develop, distribute, and maintain the financial records of the Association and the Board of Directors. The Treasurer shall be ready whenever required to give the Board any funds and financial records as demanded.

### Characteristic Duties and Responsibilities

Serves as a voting member of the Board of Directors, attends all meetings of the Board.

Provides a current year-to-date Treasurer's Report showing account activities for each active account held by OASFAA at each Board Meeting or upon request by the President. See example in Appendix.

Receives and disburses moneys of the Association.

Maintains adequate, current and appropriate records of all transactions.

Reconciles bank statement monthly and provides a copy of the reconciled statement to the Finance Chair.

Is responsible for the proper and timely invoicing of creditors, paying of bills, and filing of all reports to include all necessary tax returns and audits.

Assists with the formulation of the Association's annual budget and recommends financial policies.

Assists any Association committee or sponsored activity needing advice or financial service.

Provides the Finance Chair with any requested materials needed for the annual audit, which is typically performed as soon as possible after the Annual Conference.

Sends billing notices and invoices in conjunction with membership dues, receives payments, and maintains records of paid memberships.

Establishes and/or maintains PayPal account for all applicable uses.

Sends billing notices in conjunction with mailing of Association conference registration materials.

Receives pre-paid registrations for conferences.

Develops list of members and distributes it to the Board of Directors.

Maintains the following records or documents:

- Copy of Policies & Procedures Manual
- List of bank holdings

- Current statement of assets and liabilities
- Bank statement for the current year and any reconciled statements from the previous year
- Treasurer's reports for the current fiscal year
- Sufficient supply of blank checks

Manages the registration desk at Association conference.

Performs other functions as assigned by the President or prescribed by the Board of Directors.

Serves on the Finance Committee.

Ensures the Treasurer Elect is fully trained to assume all Treasurer duties, including usage of financial accounting software.

The Treasurer provides the Secretary electronic copies of OASF AA financial records. This is to ensure a back up copy of such records is available in the event of catastrophic data loss of the Treasurer's system. It is recommended that backup files be exchanged on or about October 1st and April 1st of each year.

The Treasurer shall be bonded.

The Treasurer shall forward a copy of the bank reconciliation and bank statement monthly to the Finance Chair.

#### Length of office

One year commencing July 1.

### **Treasurer-Elect**

#### Basic Function

The Treasurer-Elect shall assist the Treasurer by learning procedures for the responsible receipt and disbursement of funds in accordance with the directives established by the Directors/Officers. The Treasurer-Elect shall assist the Treasurer in maintaining appropriate and adequate financial records and will assist in the preparation of the audited annual financial report to the Association. The Treasurer-Elect shall fully prepare himself/herself for transition to the position of Treasurer by the end of his/her one-year term of service.

#### Characteristic Duties and Responsibilities

Serves as a voting member of the Board of Directors, and attends all meetings of the Board.

Assists the Treasurer in the receipt and disbursement of all monies of the Association.

Chairs the Membership Committee.

Responsible for learning to use the financial accounting software used by the Association.

Assists the Treasurer in maintaining adequate and appropriate records of all transactions, and reviews the reconciled bank statements on a monthly basis.

Assists the Treasurer in the proper and timely invoicing of creditors, paying of bills, and filing of all reports to include all necessary tax returns and audits.

Assists the Treasurer with the formulation of the Association's annual budget.

As a non-voting member of the Board of Directors, participate in all activities of the Board and reports to the Board and membership when directed.

Assists any Association committee or sponsored activity needing advice or financial service.

Assists the Treasurer in the recommendation of an auditor for Board approval and cooperates with the auditors in completing the annual audit.

Assists the Treasurer in sending billing notices in conjunction with mailing of Association conference registration materials.

Assists Treasurer in receiving pre-paid registration for conferences.

Assists the Treasurer with the management of the registration desk at Association conferences.

Attends the NASFAA Leadership Conference, typically held in late February, on the Association Management track; and participates in the Hill Visits at the end of the conference.

Performs other functions as assigned by the President, Treasurer, or the Board of Directors.

#### Length of office

One year commencing July 1

### **Secretary**

#### Basic Function

Develops and distributes written records of the Association for the term of office, including minutes of the Board of Directors and Association business meetings or electronic actions.

#### Characteristic Duties and Responsibilities

As a voting member of the Board of Directors, attends all meetings of the Board and develops and distributes Board of Directors meeting minutes to the Board members and other designated Association members. Minutes should be distributed to the Board members prior to the next meeting.

Develops and distributes Association Annual Business Meeting minutes to the membership.

Maintains the following records or documents:

- Copy of the Articles of Incorporation, Constitution and By-Laws.
- Copy of the Policy and Procedures Manual.
- Official Association logo
- Minutes:
  - Board of Directors and Association business meeting minutes from the previous term of office, so that the current Board of Directors has access to them. At the end of the term of office, these minutes are forwarded to the Historian.
  - Board of Directors and Association business meeting minutes of the current term. At the end of the term of office, these minutes are passed to the new Secretary.
  - All written reports made to the Board of Directors and Association are made a part of the minutes and maintained.

The Secretary shall receive and retain electronic copies of OASFAA financial records. This is to ensure a backup copy of such records is available in the event of catastrophic data loss of the Treasurer's system. It is recommended that backup information be exchanged on or about October 1st and April 1st of each year.

Collects all correspondence forwarded by all other members of the Board of Directors and forwards records to the Historian.

Performs other functions as assigned by the President or prescribed by the Board of Directors.

#### Length of office

One year commencing July 1.

### **Past President**

#### Basic Function

Provides counsel and guidance to the incumbent President and Board of Directors.

#### Characteristic Duties and Responsibilities

Serves as a voting member of the Board of Directors, attends all meetings of the Board.

Concludes his/her final six (6) months of service on the Board of Directors of the Southwest Association of Student Financial Aid Administrators (SWASFAA). The OASFAA President begins SWASFAA Board service on January 1 and continues until December 31 of each calendar year. This arrangement ensures that the same OASFAA individual serves on the SWASFAA Board for the duration of a SWASFAA President.

Traditionally chairs the Nominations and Elections and Long Range Planning Committees.

Assist President-Elect in review and update of OASFAA Policies and Procedures.

#### Length of office

One year commencing July 1

### **Delegates at Large**

#### **Basic Function**

Serves as a voting member of the Board of Directors, attends all meetings of the Board.

Serve as liaison between Executive Board and Membership.

Bring to Executive Board issues of concern from the Membership.

Assist as needed at conferences.

#### **Characteristic Duties and Responsibilities**

Participate in the meetings and activities of the Board and contribute to the formulation of policies and practices of the association. Perform such duties as are assigned by the President or prescribed by the Board of Directors. May serve as liaison between various committee chairs and the Board of Directors.

#### **Length of office**

Two years, commencing July 1. There are 2 Delegates at Large positions, and elections are done on an alternating basis so there is always a Delegate on the Board who is in his/her second year.

## ***V. Business Meetings***

### **Meetings**

As a corporation, at least one business meeting per year is required; a business meeting is usually held in conjunction with the conference. Robert's Rules of Order are used as the determinant of appropriate motions and voting procedures for all OASFAA meetings.

### **Agendas**

The President is responsible for drafting and printing the agenda for the meeting. The agenda usually includes review and acceptance of the minutes of the prior business meeting and the Treasurer's report, reports from committee chairs, presentation of the slate of officers for the following year with a request for additional nominations and any old or new business. Other topics may be raised from the floor.

### **Location of Meetings**

The business meeting is usually held at the same site as the conference.

## **Meeting Minutes**

Minutes of the prior business meeting should be prepared by the Secretary and distributed to the Association at the business meeting or in conference packets.

## **Treasurer's Report**

The Treasurer is responsible for preparing and copying the Treasurer's reports for distribution at each business meeting. **The Treasurer's Report should cover the previous year's financial activity.**

## ***VI. Standing Committees***

### **Committee Descriptions, Policies & Functions**

Each committee chair is responsible for reviewing and updating the descriptions, policies and functions section of the Policies and Procedures Manual for his/her committee at the end of his/her term as chair and communicating any changes to the President-Elect. Standing committees are named in the OASFAA Constitution and By-Laws.

The President of OASFAA serves as an ex-officio member of all committees.

Committee chairs are appointed by the President-Elect for their term as President. Committee chair terms commence on July 1 of each year. Each chair is expected to attend all full Board of Director Meetings and provide reports on the activities of their committees.

Committee chairs are responsible for populating their committees with the appropriate number and, if specified, the required profile of member. Chairs may call their committee meetings as needed or as requested by the President.

Committee chairs are appointed for a one year term but can serve for additional years if requested. Chairs are responsible for passing on the history and reference materials to the next chair or the President at the end of their terms. Chairs are also responsible for providing guidance, figures and/or information in the development of a budget.

## **Advisory Committee**

### **Basic Function**

The primary purpose of the Advisory Committee is to provide valuable information, input and feedback to the OASFAA Board of Directors.

The Advisory Committee also will review issues or concerns raised by the Board of Directors and make recommendations to the Board concerning what action should be taken by the Association. The President-Elect of the Association chairs the Advisory Committee.

The Advisory Committee shall evaluate nominations for all OASFAA awards and make recommendations to the Board of Directors. The Board of Directors will have the final decision regarding the selection of award recipients.

### Membership

The President-Elect, with the support and advice of the President, appoints OASFAA members to serve a two-year term of service to the Advisory Committee. The members will be appointed on a rotating basis so that the committee will consist of members serving their first year and their second year. Each year those ending their second year will be replaced or renewed.

The makeup of the advisory committee includes 2 members of each sector of OASFAA as follows: 4-year schools, 2-year schools, private schools, and career technology centers.

Representatives from the Regent's Office are generally invited as special guests to the Advisory Committee or OASFAA Board to provide information and updates on their programs.

### Meetings

Meets as necessary. With input from the President, the President-Elect determines if there is a need for a meeting and prepares an agenda, then notifies committee members of the time and place of the meeting in a timely manner, presides over the meeting and appoints an individual to take minutes of the meeting.

### Reports

The President-Elect attends all meetings of the Board of Directors and reports items being discussed by the Advisory Committee.

Suggests changes to the Association's Policies and Procedures that require approval of the Board of Directors.

Performs other duties as directed by the President or Board of Directors.

## **Conference Committee**

### Duties of the Chair

Prepares conference budget for Executive Committee.

Selects committee members and delegates duties.

Typically, the President selects a Program Chair, an Entertainment Chair and a Local Arrangements Chair.

The Conference Committee, along with the President, will have a planning meeting to come up with a theme as well as discuss possible general and interest session topics.

The Program, Local Arrangements, and Entertainment Chairs will seek committee members to help with their specific duties.

The Conference Committee will be in contact frequently to ensure that the plans are progressing in a timely fashion.

The Conference Chair works closely with the hotel contact person. One Conference Committee meeting should be held at the conference center so that the room layouts, catering arrangements, menus, AV arrangements, etc. can be seen firsthand. The Conference, Program, Local Arrangements, Entertainment, and Corporate Chairs should be included in the on-site committee meeting.

Responsible for arranging the registration area needs.

Attend the OASFAA Board meetings and report on conference planning status, requesting Board members help as appropriate.

Submit the tentative agenda to the hotel as soon as the Program Chair has it completed.

Set the dates for the conference registration form, the letter from the President to the Association, the vendor registration form, and the tentative agenda to be posted to the web site.

Inform the Treasurer of the date to post as the final day to register for the conference as well as the date to be able to cancel registration with no financial penalty.

Request from the hotel on a weekly basis the number of room reservations that have been made for the conference. This will begin after the conference information has been posted to the Association's web site.

Keep in close contact with the Treasurer and Local Arrangements Chairs as the conference registrations begin to come in to track the numbers for meal counts.

Work with Corporate Relations Chair to identify direct sponsors, exhibitors, break sponsors, and other conference support.

Prepare the conference packets.

Keep the Association informed on the Service Project information.

Create the conference evaluation form and the volunteer form.

Attend the exit interview at the hotel after the conference if one is conducted.

Tabulate conference evaluations and report results at the next Board meeting. Provide figures on meal counts and conference attendees to assist in future planning.

### **Program Chair duties**

Form a committee to create the program agenda for the conference and have meetings as needed.



Work closely with the Conference Chair to meet necessary deadlines.

Attend the Board meetings and discuss the tentative agenda and seek guidance from the Board as necessary.

Find presenters and moderators for each of the sessions.

Send letters to each of the presenters and moderators informing them of the date, time, and place of their sessions as well as request any audio/visual needs.

Work closely with the hotel on the audio/visual requirements.

During the conference and prior to sessions, monitor meeting room conditions, room temperature, A/V equipment placement, and adequate seating.

Arrange hotel accommodations and travel for guest speakers or presenters as appropriate.

Work closely with the President and Conference Committee to determine a keynote speaker.

Write thank you notes to presenters/moderators/committee members as appropriate.

### **Local Arrangements Chair duties**

Form a committee to create the menu and decorations for the conference and have committee meetings as needed.

Work closely with the Treasurer and Conference Chair to determine the headcounts that will be given to the hotel by their required deadline(s).

During the conference, communicate with the hotel contact if there are any problems with the meal or break set-up.

Responsible for getting the tables decorated in time for the meal functions.

Help with the Service Project as directed by the Conference Chair.

Attend the Board meetings to provide update on local arrangements.

Attend the hotel exit interview if one is conducted.

### **Entertainment Chair duties**

Form a committee if necessary and have committee meetings as needed.

Work with Conference Committee and President to create an entertainment venue or idea that corresponds with the theme of the conference.

Responsible for securing the entertainment and requesting any deposits necessary from the Treasurer.

Attend the Board meetings and provide update on entertainment.

Communicate any special needs such as A/V or stage as soon as possible to the Conference Chair so that it can be requested from the hotel.

## **Finance Committee**

### **Basic Function**

The Finance Committee shall evaluate the financial needs of the Association for the year and make recommendations to the Board of Directors by June 15.

The appointed chair selects the committee members. The Treasurer of the Association shall serve as a member of this committee.

### **Characteristic Duties and Responsibilities**

The Finance Committee Chair shall receive from the Treasurer access to the online banking statements and oversees the validity of activity within the Association accounts each month.

Assist the Board of Directors in developing a budget for the organization and assess the percentage of last year's budget utilized, tracking expenses by category and committee.

Recommend amount of treasury balance to be invested. The amount of funds to be invested in long-term financial instruments is annually recommended by the Finance Committee to the Board of Directors.

The Finance Committee will examine the reserve fund and make recommendations regarding its size and use to the Board of Directors as part of the annual budgeting process.

Annually recommend the number and value of OASFAA scholarships to be awarded. (See scholarship section of this manual.)

Evaluate alternative sources of funding OASFAA conferences/services and alternative methods of presenting issues at statewide and regional meetings (e.g. tele-conferences).

Evaluate amount of membership dues and conference registration charges to maintain pace with inflation and program expansion.

Conduct the annual audit as soon as possible after the end of the Annual Conference.

Address other financial issues as identified by the Board of Directors.

## **Membership Committee**

### **Basic Function**

This committee is to enlist new members and to retain the present members.

### **Characteristic Duties & Responsibilities**

Contact financial aid officers at institutions of higher learning and encourage them to join the Association.

Assist Treasurer as needed in collection of membership dues.

Keep in contact with present members and encourage them to continue membership and to be active members.

Maintain and update list of current OASFAA members and prospective members, on available IBM-compatible software, to be able to provide statistics, lists, labels, and directory information as needed.

Create nametags and receipts for the annual conference.

After each conference, update the membership list and contact the Electronic Initiatives Chair with any changes.

Upon payment of membership, the Membership Chair will deliver the current password to the designated voting representative to the password-protected membership directory.

## **Multicultural Concerns Committee**

This committee was put into an inactive status 2010-2011 due to the increased activity and presence of other agencies filling these needs.

## **Nominations and Elections Committee**

### **Basic Function**

This committee is charged with selecting nominees for OASFAA offices, preparing the slate of candidates and with carrying out a fair nomination and election process.

### **Characteristic Duties & Responsibilities**

Selects a slate of candidates for OASFAA offices. Committee shall work closely with the Membership Chair in selecting candidates to ensure that candidates are members in good standing. Selections are to be made in accordance with criteria approved by the Board of Directors.

Contacts suggested candidates prior to the annual conference, informing them of the duties of the position and suggest they obtain institutional permission to serve prior to agreeing to stand for election.

## Membership

The Immediate Past President has traditionally served as the chairperson of this committee. Members should be representative of and well acquainted with a significant portion of the membership. It should be noted that committee members are prohibited from running for office during their tenure on the committee.

## Training Committee

### Basic Function

The Training Committee Chair may serve as the primary training officer for OASFAA or is responsible for coordinating with outside trainers.

### Characteristic Duties and Responsibilities

Presides over Training Committee. Serves as liaison with SWASFAA Training Committee, coordinating training calendars, and recommends training sites.

Recommends possible trainers and training programs to the OASFAA board and with approval by the Board of Directors, develops training programs.

Attends OASFAA Board of Directors meetings and provides activity reports to the Board. Develops a budget for committee activities.

## Corporate Relations Committee

### Basic Function

Responsible for contacting a variety of lenders, guarantors, collection agencies and loan servicing companies about attending and sponsoring the OASFAA Conference(s) and other OASFAA meetings/seminars/events. The chairperson is the only member of this committee, but may solicit assistance as needed from local personnel.

### Characteristic Duties and Responsibilities

Communicate with persons/companies listed on a constantly updated corporate sponsor list. Communication states the dates of the upcoming OASFAA conference, meeting, seminar or event.

Create Corporate Registration Form for each event. Form requests the sponsor's name, title, agency/institution, address, telephone and fax number, and email address; which is used to update the OASFAA Directory. The Registration Form for each event will also indicate required fees to attend/exhibit, dues if applicable and sponsorship opportunities to support the event.

Communicate the standing exhibiting opportunities for the OASFAA Conference(s).

Receives and answers inquiries from sponsors regarding expenses they may fund, serving as liaison between sponsors and conference center/hotel regarding exhibit area, set up and break down of exhibits, and determining availability and cost of electrical and other special needs in exhibit area.

Coordinates with the Treasurer on all payments, reviews and totals all payments before forwarding to the OASFAA Treasurer for deposit. Keeps accurate and current records regarding sponsor registration, sponsorship commitments, receipt of payments and accounts receivable from sponsors.

Coordinates and facilitates the exhibit area and exhibitors.

Facilitates corporate recognition at the conference/meeting/event with the appropriate committee chairperson.

Attends all OASFAA Board of Directors meetings to discuss past or upcoming conferences/meetings/events and provides financial information to the Board, including funds pledged, collected, and outstanding for each event.

### **Electronic Initiatives Committee**

#### **Basic Function**

Promotes the use of electronic technology for the delivery of student financial assistance at member institutions. Identifies and addresses electronic processing technical or policy issues on the behalf of the Association.

#### **Characteristic Duties and Responsibilities**

Advises the Association's President and Board of Directors regarding issues relating to the automated delivery of student financial assistance. Assists, as required, in the formulation of OASFAA policy statements and position papers regarding electronic data processing.

Identifies common issues and concerns, which involve the electronic delivery or administration of student financial assistance. Proposes and pursues activities which will facilitate or enhance the electronic processing capabilities and proficiency of Association members.

Advises the Association's President, Board of Directors, and Conference Committee on training needs and issues related to electronic data processing. Committee activity reports are presented at each meeting of the Board of Directors and at each Association Business Meeting.

Serves as a clearinghouse for issues related to electronic processing concerns of Association members. Maintain OASFAA website and serves as a liaison with the Webmaster.

Coordinates with the Treasurer to maintain the PayPal Account.

Resets the password to the password-protected membership directory on September 1<sup>st</sup> of every year.

## **Historian/Archivist Committee**

### **Basic Function**

Responsible for compiling all historical information available on the history of the Association and maintaining all records of the organization on a permanent basis.

### **Characteristic Duties and Responsibilities**

Coordinates OASFAA activities pertaining to previous historical events, including but not limited to anniversary celebrations, past President luncheons, etc.

Chair attends Board of Directors meetings, reporting to the Board the status of activities and receiving. Chair develops and presents a budget for the upcoming year to the Board by June 1.

Records maintained should include all brochures related to training and/or conferences, photos, directories, officer/committee member lists, and any other relevant archival material. The Secretary shall forward a copy of all Board of Directors minutes, business meeting minutes, Treasurer's reports, committee reports, President's reports, Articles of Incorporation/Constitution/By-Laws changes and any documents coming to the attention of the Board of Directors to the Archivist. Any other person should forward OASFAA materials to the Archivist for determination if they should be retained. The Archivist will review all records and determine which materials should be maintained.

Responsible for photography or photographer at OASFAA events

## **Long Range Planning Committee**

### **Basic Function**

To develop long-term recommendations related to OASFAA's mission, structure, operation, and service to members and to maintain the Association's Policies and Procedures.

### **Characteristic Duties and Responsibilities**

Discusses alternatives and makes long-term recommendations regarding OASFAA's mission, structure, operation and service to members.

Reviews and suggests changes to the Association's Policies and Procedures.

Develops a long-range plan for the Association.

Performs other duties as directed by the President or Board of Directors.

### **Membership**

The immediate Past President serves as chair, with members appointed by the chair. Members should be representative of the membership and have a history of significant experience serving in OASFAA elected offices and on committees.

### **School and Community Relations Committee**

This committee was put into an inactive status 2003-2004 due to the increased activity and presence of other agencies filling these needs.

### **Site Selection Committee**

#### **Basic Function**

Committee usually consists of one person who recommends conference sites to the President and who works in coordination with the President-Elect, or President who will be presiding over the conference.

#### **Characteristic Duties and Responsibilities**

Visits and evaluates possible conference sites (6-12 months prior to conference).

Negotiates room rates, meeting rooms, complimentary benefits, parking fees, etc.

Discuss general conference agenda with hotel conference sales representatives; including meal functions, general sessions, interest sessions, registration area, A/V needs, exhibit area, etc.

Presents conference site and/or hotel contracts to President for consideration.

Correspond to conference site representative/contact person informing him/her of site selection and providing name/address/phone number of Conference Chair who will be liaison with site representative.

Attend Board of Directors meetings and periodically provide progress reports.

### **Legislative Committee**

#### **Basic Function**

The primary responsibility of the OASFAA Legislative Committee is to assist in keeping members of the Association informed concerning national and state student aid issues and legislation.

#### **Characteristic Duties and Responsibilities**

The Legislative Committee provides a channel for the membership to be regularly informed of state and federal initiatives related to student aid issues. Utilizing the OASFAA listserv and Committee reports, the Legislative Committee will communicate to the membership and the OASFAA Board of Directors.

The Legislative Committee may make recommendations to the Board concerning student aid issues and legislation and may receive specific assignments from the Board.

### Membership

The Legislative Committee consists of one individual from each sector as follows: 4-year schools, 2-year schools, private schools and career technology centers. The chair may also select a member from OSRHE.

## ***VII. Ad-Hoc Committees***

The appointment of Ad-Hoc committees is at the discretion of the President with the approval of the Board of Directors; chairs of new Ad-Hoc committees are responsible for developing the Policies & Procedures section for that committee with input from the President, Board of Directors and committee members. The President of OASFAA serves as an ex-officio member of all committees.

## ***VIII. Operating Policies and Procedures***

### **Annual Operating Budget**

The Finance Committee shall develop and recommend an overall budget of expected revenues and expenditures for the Association. The committee shall make recommendations relative to registration fees, late fees, sponsor and exhibitor fees, etc. The Board of Directors will approve the budget. (See specific duties of the Finance Committee) See Appendix for [Budget template](#).

### **Reimbursement Policy**

The following are categories of expenses that might be incurred on behalf of OASFAA. If applicable, the OASFAA committee should be identified on the reimbursement form for budgeting purposes.

- Cabs/Limos/Toll-fare
- Committee Luncheons-OASFAA Board & Advisory, (with the exception of the Board and OASFAA Advisory Committee it is recommended that additional luncheon meetings be limited and pre-approved by the OASFAA Board)
- President's attendance at NASFAA and SWASFAA Conference
- President-Elect and Treasurer-Elect's attendance of Leadership Conference in Washington D.C.
- Other Conference/Workshop attendance (by Board approval)
- Lodging
- Meals
- Postage
- Printing/photocopying
- Transportation
- Other expenses (i.e., conference expenses, decorations, presenter expenses, hotel billing)



The Expense and Reimbursement Request Form must be signed by the claimant, the Treasurer, and the President before payment may be made. All expenses must be submitted with a signed receipt. The Treasurer and/or President may request additional documentation to clarify reimbursement if needed. Reimbursement of the President's expenses must be approved by the immediate Past-President. Reimbursement form included in the Appendix.

The use of a bank debit/credit cards is restricted to the President, President-Elect, Past President and Treasurer. Receipts must be submitted to the Treasurer immediately, or as soon as possible, so that the expenses can be properly booked and the bank statement balanced.

### **Committee Expenses**

Meals for the Board of Directors meetings are provided at OASFAA's expense.

Projected expenditures for other committee functions (mailings, printing, travel, and necessary meals) should be submitted to the Board for pre-approval. Each committee chair is responsible for developing and submitting a budget of expected expenditures to the Board of Directors at the beginning of each year. Most committees incur little or no reimbursable expenses.

### **Accounts Receivable Policy**

OASFAA does not accept purchase orders because delay of payment may endanger the Association's ability to meet its own obligations. Returned checks will be resubmitted to the banking institution for a review and then collected from the payer. No interest is charged on late payments. Stale dated checks (issued by the Association) will be canceled on the Association's ledger in conjunction with generally accepted accounting procedures. Exceptions are made on a case by case basis determined by the Board of Directors.

### **Alcohol Policy**

OASFAA will not pay for wine, liquor or beer at any function.

### **Special Awards, Service Awards and Recognitions**

**Service Awards and Recognitions:** The President is responsible for recognizing those who have been of service to OASFAA. It is the decision of the President as to whether they present a plaque or a gift that would better fit the personality of the recipient. The presentation will be made by the President at the annual conference.

- Plaque/gift for outgoing President
- Recognition of Retirees

- Recognizing Years of Service honoring persons who have served in the profession in increments of 5 years

Special Awards: A solicitation for nominees for these awards should be made to all members through a posting on the OASF AA listserv. Nominations must be made by active members. No current member of the Advisory Committee or voting member of the Board of Directors is eligible for the award. The Advisory Committee shall evaluate nominations for the award and make recommendations to the President. The decision regarding the selection of the recipient must be done by the Board of Directors in executive session. There is no minimum/maximum number of awards to be distributed each year; however, it should be understood that these awards are a special distinction and should not be awarded without careful deliberation.

- Philo Brasher Emerging Leadership Award:

This award was established by SWASF AA in honor of Philo Brasher who served many years in the Association. Each state was given the responsibility of determining the criteria for the award. The OASF AA Advisory Committee shall evaluate nominations for the award and make a recommendation to the Board of Directors for final decision regarding the selection of recipient. The recipient should be an individual who has served OASF AA and made a contribution to the Association. OASF AA will pay the registration fee to the SWASF AA annual conference on behalf of the Oklahoma award winner. OASF AA will also match the \$250 that SWASF AA donates to the general scholarship fund of the recipients' school. OASF AA will notify the SWASF AA Treasurer of our recipient and request an invoice for the \$250 in the fall. (*See Institutional Responsibility under Scholarship Procedures.*)

- Honorary Membership Award:

Honorary Membership in OASF AA is the highest honor that the Association can bestow on a person who is neither a member nor affiliated with a member organization. Since this is the highest award that OASF AA can give, the individual receiving it must have made truly outstanding contributions to the Association and to the profession over a sustained period of time. It is not expected that honorary membership will be granted in recognition of a single accomplishment, but for continued efforts over a period of time. The OASF AA Advisory Committee shall evaluate nominations for the award and make a recommendation to the Board of Directors for final decision regarding the selection of recipient. Honorary membership will be conferred only with the approval of the majority of the Board of Directors. Honorary members are extended the same membership privileges as Associate members. (The Board of Directors approved this section January 31, 1998).

- Distinguished Service Award:

This award is intended to recognize a practicing student financial aid professional at an institution. He/she should have contributed unique and long lasting efforts to the Association, the profession, or the cause of financial aid in Oklahoma. Only active members of the association are eligible for nomination. Each nomination must be supported by two other members of the association.

- Partner Award:

Upon recommendation by the Advisory Committee, a Partner Award may be made by the Association to another individual, not a practicing aid administrator, whose efforts are important to advancing the profession or the needs of students in Oklahoma. The OASFAA Advisory Committee shall evaluate nominations for the award and make a recommendation to the Board of Directors for final decision regarding the selection of recipient. The Partner Award will be awarded at the annual conference.

Historical lists of award recipients are included in the Appendix.

### **Elections / Campaign Guidelines**

Campaigning (buttons, fliers, etc.) is discouraged.

### **Contract Policy**

The President is the only person authorized to sign contracts for the Association. In the absence or inability of the President to sign, refer to the Constitution and By-Laws.

### **Decentralized Training**

OASFAA offers Decentralized Training on topics that are timely and pertinent for its members and constituents. The OASFAA Training Committee will be responsible for information, coordination and administration of any training opportunities available and will make recommendations to the Board regarding participation and procedures for final approval.

### **Investment Policy**

The amount of funds to be invested in long-term financial instruments is recommended by the Finance Committee with the decision of the Board of Directors.

### **Label Policy**

Conference attendee lists will be provided to interested groups for mailings as long as they are not for commercial purposes.

### **Listserv Policy**

1. All messages must have a subject in the subject line.
2. The OASFAA Listserv is not to be used for business purposes. For-profit, nonprofit, and government entities are not permitted to use the listserv as a vehicle for advertising their products or services. This includes products or services for which there are not costs. Job change announcements should be for

information purposes (i.e., new company, title, phone number, address), and not include any promotion of the institution or company.

3. “Job Wanted” postings are not permitted.
4. “Position Available” postings are permitted. However, such posting may not include any advertisements promoting the institution or company for which the position is available.
5. OASF AA retains the right to deny access to individuals who do not adhere to these policies.
6. Associate members may advertise free training opportunities.

### **Webmaster**

On May 7, 2008, the OASF AA Board hired fj, LLC as our web service provider, to be contracted on an annual basis. The Electronic Initiatives Chair works as a liaison with the Webmaster in getting pertinent information posted on the web page.

### **Officer Travel Policy**

OASF AA pays the costs associated with sending the President to NASF AA and SWASF AA.

OASF AA pays the costs associated with sending the President-Elect and Treasurer-Elect to the NASF AA Leadership Training Conference.

### **Resolutions Policy**

See Robert's Rules of Order

### **Reserve Fund Policy**

The Finance Committee will examine the Reserve Fund and make recommendations to the Board of Directors as part of the annual budgeting process.

### **Revenue and Expenditures Policy**

OASF AA shall not be operated for profit except that the Association shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distribution in furtherance of its purposes as set forth in the By-Laws. The Association shall not authorize or issue shares of stock, nor obtain any dividends, nor make any loans to its member organizations, members of the Board of Directors, officers, agents or employees.

OASF AA will not intentionally enter into a deficit spending situation.

### **SWASF AA Gift Practices**

SWASF AA Gifts: At the annual SWASF AA conference, it has become a tradition for each state to bring gifts that can be used by the conference committee as door prizes, fundraising or as otherwise designated. Traditionally, OASF AA has allocated \$100 for such gifts. The President is responsible for ensuring that such gifts are secured and presented to SWASF AA.

### **Memorial Policy**

Memorials and/or floral arrangements are appropriate for financial aid colleagues who have made significant contributions to the financial aid profession through commitment to the organization by holding office(s), committee involvements, or as an advocate for needy students.

1. Funerals – At the death of a financial aid colleague, as described above, it is appropriate to send a floral arrangement to their services on behalf of OASF AA. Floral arrangements should be limited to a reasonable amount. The suggested amount is \$50.00, unless the circumstances dictate more, in which case, it should not exceed \$100.00.
2. Scholarship and/or Memorial Charitable Contributions – If the deceased or their families have requested a memorial contribution, or a donation to the OASF AA scholarship fund, contributions will be from \$50.00 to \$100.00 per event.
3. Authority – The President or their designee will have the authority to make such arrangements.

### **Scholarship Procedures**

- Number and Amount of Awards:

The Board of Directors will annually determine the number and amount of each individual scholarship upon receiving the recommendation of the OASF AA Finance committee. The amount will be based on the income earnings available to the scholarship fund from all sources during the preceding year. The distribution will allow for \$500 institutional awards and will not exceed the income earnings available. Donor policies mandating complete utilization of a scholarship gift within a specified time period will be honored.

- Selection of Institutional Recipients:

The educational institution(s) to receive scholarship funds on behalf of their students will be selected by a drawing conducted at the business meeting after the conference. An institution will be eligible for inclusion in the drawing if the institution is considered a current and paid member of the Association at the time of the drawing. Representatives from the selected institutions need not be present in order to receive the award. Each institution may not receive in excess of one annual scholarship award. No institution can receive a second scholarship until every qualified institution has received one scholarship. A history of the scholarship recipients is located in the Appendix of this document.

- Institutional Responsibility:

It is the recipient school's responsibility to award the scholarship to a qualified student at their respective institution. The selection of the student recipient is based solely upon the policies and procedures of the awarded institution. Each institution receiving an award shall report to the OASFAA Board of Directors the name and academic status (major or program of study) of the student recipient. The student recipient will be provided the name of the current OASFAA President and encouraged to acknowledge OASFAA's support.

Scholarships and fellowships granted to US citizens and permanent resident internationals may be taxable in whole or in part as determined by the resident/academic status of the recipient as well as the purpose and use of the scholarship or fellowship. In that the OASFAA scholarship funds are provided to an educational institution for subsequent awarding to individual students, it is the educational institution's responsibility to ensure that applicable IRS regulations are met. The grantor of the scholarship to the student is the educational institution, and not OASFAA. The institution will notify the OASFAA Treasurer of the selection(s) within 120 days of notification the institution has received the scholarship.

#### Scholarship Funds:

The endowed scholarship fund will be maintained in a separate interest bearing account. Interest from this account will be used to fund the annual scholarship awards. Interest earnings may be allowed to accumulate when such earnings are not sufficient to award a full scholarship. The disbursement of funds to the recipient's institutions will be coordinated between the OASFAA Treasurer and the Director of Financial Aid at the institution. Generally, these funds will be disbursed to the institution's general scholarship fund. The funds will not be disbursed to the institution until a student recipient has been selected. It is the intention of the OASFAA Board to increase the Scholarship Endowment to \$100,000.

### **Changes to the Constitution and Articles of Incorporation**

Any changes to the Articles of Incorporation must be distributed to the membership at least 30 days prior to the vote on the changes.

Changes to the Articles must be registered with the Secretary of State. Rod Durrell, OASFAA's registered agent on our Articles of Incorporation, performs this duty: the OASFAA President and the OASFAA Secretary must sign the submission of the changed Articles before being submitted to the Secretary of State.

## ***IX. Conference Related Policies and Procedures***

### **Registration Categories**

#### Regular Registration

An individual registering for the conference as a regular registrant is entitled to attend all events and meals. He/she will be provided a name badge that indicates the status of a full conference registration.

**One Day Registration**

An individual may register for only one day of the conference. He/she will be entitled to attend all events and meals on that day. The name badge will indicate the status of a one day registration.

**Refund Policy (Regular Registration and Vendor Registration)**

Requests for refunds received by the deadline date printed on the conference registration form will be granted in full. Requests filed after *that date* will be denied and no refunds given. If the conference registration fee is not paid, the registrant will be denied registration for future conferences until the debt is satisfied.

In the event that the registrant is not able to attend the conference and the deadline for a refund has passed, the registration fee is transferable to another member from their institution.

Should the conference be canceled, OASFAA will refund the registration fee at 100%.

All requests for refunds must be made in writing and received by the date specified. The Treasurer shall be responsible for enforcement of this policy. Appeals shall be directed to the Executive Board whose decision shall be final.

**Waiver of Registration Fees**

All persons attending the conference, including Board members and officers will pay the registration fee. One (1) SWASFAA Representative will be granted free registration and a hotel room, but is responsible for his/her travel. Additional SWASFAA representatives are responsible for paying registration fees, travel and hotel costs.

Guest speakers who are not directly involved in the administration of student aid may have the fee waived.

Representatives of the US Department of Education will have complimentary conference registrations. However, if the Department desires to use vendor space in the display area, standard minimum charges apply.

The Board of Directors, upon the recommendation of the Conference Committee Chair, will decide any request for an exception to the above policy.

**Complimentary Rooms at Conference**

Complimentary sleeping rooms, as available, will be assigned at the Board's discretion.

**Honoraria and Travel Expenses for Conferences**

Honoraria will be offered when deemed necessary by the Conference Chair and President to bring in a speaker from outside the Association who would not otherwise attend such a meeting.

The Association will offer to reimburse invited speakers from outside the profession for their travel expenses if deemed necessary by the Conference Chair and President.

When impossible to secure a practicing financial aid administrator, or when the topic requires the expertise of a commercial consultant or vendor, it is acceptable to invite a speaker who represents a for-profit organization. Such persons are expected to pay their own registration fees for the conference if they plan to attend sessions other than the one(s) they are presenting. Such persons will receive no reduction in the normal vendor fees established for the conference. An honorarium may be approved by the Board based on special circumstances.

### **Service Project**

The Local Arrangements Committee will select a service project.

### **Special Interest Group Meetings at Conference**

During recent years, special interest groups have come to utilize the conference as an opportunity for group meetings. With the continued awareness of travel costs, it has become incumbent upon special groups, like service agencies and task forces, to utilize the conference for meetings, which facilitate the consolidation of travel expenses and take advantage of the fact that many aid administrators are already attending the conference. Because of this occurrence, the Association believes it is necessary to have reasonable guidelines for the purpose of maintaining the service of our membership and to establish a framework for these special groups to coordinate their activities within the Association's program.

We affirm the importance of coordinating efforts to achieve mutual goals. As a result OASFAA will seek to accommodate these special groups to enhance mutual interests of our members.

#### *Guidelines for Special Interest Group Meetings*

- Special groups will coordinate their schedules of meetings with the Conference Chair.
- Assignment of meeting and/or sleeping room space and time slots are at the discretion of the Conference Committee and will be determined only after conference activities are first accommodated.
- In no instance may a special activity be scheduled which will conflict with a scheduled conference function.
- Participants at special meetings who wish to attend the conference must register at the conference under the policies of the Association for regular members and non-members, including paying the appropriate conference fees.
- Special groups must establish independent credit with the hotel/conference facility for food, beverages, A/V equipment and other services.
- The Association will assume no liability associated with special groups or their activities.



**Dais Seating**

The President will be responsible for arrangement of the seating at the conference luncheons and will notify the Conference Committee in advance so name cards can be provided. Tradition has the elected officers at the dais along with any speaker and the Conference Chair. This is flexible based upon the variations in the program, luncheon, and conference schedules.

**Guests**

OASF AA traditionally invites guest speakers and presenters to join us at meals, along with any registration personnel provided by chambers of commerce, etc. Spouses, children, etc. wishing to attend meals or other functions must pay for the cost of the meal.

***X. Nominations & Elections Guidelines*****Authority / Responsibility**

The chair of the Nominations and Elections committee, traditionally the immediate Past President, selects the members of the Nominations Committee.

**Nominations Procedures**

The Nominations/Elections committee discusses possible candidates for each office. The committee may contact the Board of Directors or OASF AA members, as they deem appropriate to seek suggestions for possible candidates.

Upon selection of two or more possible candidates for each office, members of the committee contact the possible candidates and solicit their permission to place their names in nomination. The committee members provide the possible candidates with copies of applicable portions of the policies & procedures manual and any other information to advise them of the responsibilities of the position involved.

The Nominations Committee recommends a slate of candidates to the OASF AA Board of Directors. Upon adoption by the OASF AA Board of Directors, the slate of candidates is presented to the association at the business meeting.

The President, after receiving the report from the Nominations Committee Chair, solicits nominations for each position from the floor. If for any reason the committee cannot finalize a slate for approval at the business meeting, the finalized slate will be submitted to the Board of Directors for approval on behalf of the general membership.

**Elections Procedures**

The Nominations Chair is responsible for obtaining vitae and statements of candidacy from each candidate and forwarding to the OASFAA Electronic Initiatives Chair to be placed on the web page.

The Membership committee provides a list of eligible voting members to the Electronic Initiatives Chair; the Electronic Initiatives Chair then e-mails the eligible voters as to how to vote electronically.

To keep an accurate membership list, the Treasurer must provide a list of all members to the Membership committee after each conference. This list should identify who attended the last conference and show their status as a regular, associate or associate/voting member. See voting eligibility below.

### **Counting of Ballots**

The Electronics Initiatives Chair will inform the Nominations/Elections chair of the voting results.

### **Required Number of Votes to Win**

A simple majority is required to win.

### **Announcement of Election Results**

Announcement of results will be posted to the OASFAA listerv by the Nominations/ Elections Chair. If a runoff is required, the results will be posted on the listserv as soon as the board has ratified the election.

### **OASFAA Nomination & Elections Committee Calendar**

The President announces the slate of candidates at the spring business meeting and the nominations are finalized.

Electronic voting will occur as soon as the updated membership list has been given to the OASFAA Electronics Initiatives Chair.

The Nominations/Elections Chair reports to the Board of Directors the results of the election. The results are ratified by vote of the Board of Directors. Before the electronic ballots are destroyed, a motion to do so must be approved by the Board of Directors.

**Ex: Treasurer's Report 1, page 1**

7/23/2010

## 2009-2010 Treasurer's Report

7/1/2009 through 6/30/2010

Page 1

Category Description	7/1/2009- 6/30/2010
<b>INCOME</b>	
Conference Income	
Spring 2009 Conf. Income - School	500.00
Spring 2010 Conf. Income - School	18,650.00
Spring 2010 Conf. Income - Vendor	4,700.00
TOTAL Conference Income	23,850.00
Interest Income	46.55
Membership Dues	
Membership Dues-Refund	-100.00
Other Membership Dues	6,700.00
TOTAL Membership Dues	6,600.00
Other Income	
Decentralized Training Income	4,575.00
Scholarship Account Income	1,000.00
Spring 2010 Sup Staff Training Reimburse	675.43
TOTAL Other Income	6,250.43
<b>TOTAL INCOME</b>	<b>36,746.98</b>
<b>EXPENSES</b>	
Charitable Donations - Cash	
Citizens Caring For Children	110.00
Memorial contributions	50.00
Other Charitable Donations - Cash	-110.00
TOTAL Charitable Donations - Cash	50.00
Committee Expenses	
Electronic Initiatives	
Basic Service Fee	29.94
Website Update	375.00
TOTAL Electronic Initiatives	404.94
Training Committee	
Support Staff Training	710.50
TOTAL Training Committee	710.50
TOTAL Committee Expenses	1,115.44
Conference Expenses	
Spring 2010 Conference Entertainment	3,249.00
Spring 2010 Conference Meals	9,875.35
Spring 2010 Conference Printing & Badges	94.08
Spring 2010 Facility	3,000.00
Spring 2010 Local Arrangements	241.55
Spring 2010 Program	572.92
TOTAL Conference Expenses	17,032.90
Executive Board Expenses	
Appreciation Gifts	10.88
Executive Meetings	950.58
Pres Elect & Treas Elect to NASFAA Ldrsp	2,659.43
President Elect to NASFAA	625.00
President To NASFAA	1,971.54
President To SWASFAA	880.45
President's Plaque	8.75
TOTAL Executive Board Expenses	7,106.63

**Ex: Treasurer's Report 2, page 2**

7/23/2010

## 2009-2010 Treasurer's Report

7/1/2009 through 6/30/2010

Page 2

Category Description	7/1/2009- 6/30/2010
General Administrative Expenses	
Accounting - Tax Returns	845.00
Brochure expenses	189.00
Insurance	1,665.00
New Check Fee	27.50
Postage	8.04
<b>TOTAL General Administrative Expenses</b>	<b>2,734.54</b>
Miscellaneous Expenses	
Gifts Given	253.31
Philo Brasher Scholarship to SWASFAA	250.00
Service Pins and Awards	391.56
SWASFAA Gift	82.89
<b>TOTAL Miscellaneous Expenses</b>	<b>977.76</b>
Scholarship Account	
Scholarship Awards	1,000.00
<b>TOTAL Scholarship Account</b>	<b>1,000.00</b>
<b>TOTAL EXPENSES</b>	<b>30,017.27</b>
<b>TRANSFERS</b>	
TO Chase Scholarship Checking	-200.00
<b>TOTAL TRANSFERS</b>	<b>-200.00</b>
<b>OVERALL TOTAL</b>	<b>6,529.71</b>

**Ex: Treasurer's Report, Account Balances 1**

OASFAA Treasurer's Report  
 OASFAA Checking Account  
 July 1, 2009 through June 30, 2010

<b>Beginning Balance as of July 1, 2009</b>	\$ 89,323.04
<b>Ending Balance as of June 30, 2010</b>	\$ 95,852.75
<b>Difference</b>	<b>\$ 6,529.71</b>

OASFAA Scholarship Accounts  
 July 1, 2009 through June 30, 2010

**Beginning Balances as of July 1, 2009**

Bank of Oklahoma scholarship CD	\$ 10,000.00
Chase scholarship checking account	\$ 12,478.27
Chase scholarship CD	\$ 38,543.86
<b>Total</b>	<b>\$ 61,022.13</b>

Deposits	Interest earned & reinvested	\$ 775.71
	Spring 2010 scholarship donation	\$ 1,000.00
	<b>Total</b>	<b>\$ 1,775.71</b>

## Withdrawals

Spring 2010 award to Oklahoma Baptist University	\$ 500.00
Spring 2010 award to Western Oklahoma State College	\$ 500.00
Spring 2010 award to Oral Roberts University	\$ 500.00
Spring 2010 award to Moore Norman Technology Center	\$ 500.00
<b>Total</b>	<b>\$ 2,000.00</b>

<b>Ending Balances as of June 30, 2010</b>	<b>\$ 60,797.84</b>
--------------------------------------------	---------------------

**Ex: Budget 1**

OASFAA BUDGETS FOR 2009-20010 (as of June 30, 2010)						
	Budgeted			Over +	Budget	
	2009-2010	Received	Spent	Under -	2010-2011	
<b>INCOME:</b>						
<b>Balance Forward</b>				<b>\$100,000.00</b>		
Membership Dues	\$0.00	\$0.00		\$0.00		\$0.00
Spring Conference Total Income						
School Registrations	\$0.00	\$0.00		\$0.00		\$0.00
Vendor Registrations	\$0.00	\$0.00		\$0.00		\$0.00
Decentralized Training/Support	\$0.00	\$0.00		\$0.00		\$0.00
Interest Income	\$0.00	\$0.00		\$0.00		\$0.00
Other Income - Past Conference	\$0.00	\$0.00		\$0.00		\$0.00
Scholarship Donations	\$0.00	\$0.00		\$0.00		\$0.00
SWASFAA Reimbursement for Gift	\$0.00	\$0.00		\$0.00		\$0.00
Support Staff Training Reimbursement	\$0.00	\$0.00		\$0.00		\$0.00
<b>Total Income</b>	<b>\$0.00</b>	<b>\$0.00</b>		<b>\$0.00</b>		<b>\$0.00</b>
<b>EXPENSES:</b>						
Advisory	\$0.00		\$0.00	\$0.00		\$0.00
School and Community Relations	\$0.00		\$0.00	\$0.00		\$0.00
Corporate Relations	\$0.00		\$0.00	\$0.00		\$0.00
Electronic Initiatives	\$0.00		\$0.00	\$0.00		\$0.00
Finance	\$0.00		\$0.00	\$0.00		\$0.00
Historian	\$0.00		\$0.00	\$0.00		\$0.00
Long Range Planning	\$0.00		\$0.00	\$0.00		\$0.00
Membership	\$0.00		\$0.00	\$0.00		\$0.00
Multicultural Concerns	\$0.00		\$0.00	\$0.00		\$0.00
Nominations and Elections	\$0.00		\$0.00	\$0.00		\$0.00
Site Selection	\$0.00		\$0.00	\$0.00		\$0.00
Training Committees						
Decentralized Training	\$0.00		\$0.00	\$0.00		\$0.00
Support Staff Training	\$0.00		\$0.00	\$0.00		\$0.00
Other Training						
<b>Total Committee Expenses</b>	<b>\$0.00</b>		<b>\$0.00</b>	<b>\$0.00</b>		<b>\$0.00</b>
<b>CONFERENCE EXPENSES:</b>						
Spring Conference Center	\$0.00		\$0.00			\$0.00
Spring Conference Entertainment	\$0.00		\$0.00	\$0.00		\$0.00
Spring Conference Meals	\$0.00		\$0.00	\$0.00		\$0.00
Spring Conference Program	\$0.00		\$0.00	\$0.00		\$0.00
Spring Conference Audio/Visual	\$0.00		\$0.00	\$0.00		\$0.00
Spring Conference Printing/Nametags	\$0.00		\$0.00	\$0.00		\$0.00
Spring Conference Decorations	\$0.00		\$0.00	\$0.00		\$0.00
Spring Conference Vendor Tables	\$0.00		\$0.00	\$0.00		\$0.00
Spring Conference Vendor Room	\$0.00		\$0.00	\$0.00		\$0.00
Spring Conference Hotel Deposit	\$0.00		\$0.00	\$0.00		\$0.00
Spring Conference Citizens Caring for C	\$0.00					\$0.00
<b>Total Spring Conference Expenses</b>	<b>\$0.00</b>		<b>\$0.00</b>	<b>\$0.00</b>		<b>\$0.00</b>
Past Conference Meals & Facilities						
Past Conference Audio/Visual						
Future Conference Cancellation Fee						
<b>Total Other Conference Expenses</b>	<b>\$0.00</b>		<b>\$0.00</b>	<b>\$0.00</b>		<b>\$0.00</b>
<b>GENERAL ADMINISTRATIVE EXPENSES:</b>						
Accounting/Tax Returns	\$0.00		\$0.00	\$0.00		\$0.00
Executive Meetings	\$0.00		\$0.00	\$0.00		\$0.00
Postage	\$0.00		\$0.00	\$0.00		\$0.00
Supplies	\$0.00		\$0.00	\$0.00		\$0.00
Pres Elect/Treas Elect to NASFAA Ldrshp	\$0.00		\$0.00	\$0.00		\$0.00
President to NASFAA 2008	\$0.00		\$0.00	\$0.00		\$0.00
President to SWASFAA	\$0.00		\$0.00	\$0.00		\$0.00
Philo Bratcher Recipient to SWASFAA	\$0.00		\$0.00	\$0.00		\$0.00
Philo Bratcher Scholarship to SWASFAA	\$0.00		\$0.00	\$0.00		\$0.00
Misc. Administrative Expenses	\$0.00		\$0.00	\$0.00		\$0.00
New Checks \$27.50						
Insurance	\$0.00		\$0.00	\$0.00		\$0.00
SWASFAA Gift	\$0.00		\$0.00	\$0.00		\$0.00
Gifts Given	\$0.00		\$0.00	\$0.00		\$0.00
Past President Gift	\$0.00		\$0.00	\$0.00		\$0.00
Service Pins and Awards	\$0.00		\$0.00	\$0.00		\$0.00
<b>Total General Administrative Expenses</b>	<b>\$0.00</b>		<b>\$0.00</b>	<b>\$0.00</b>		<b>\$0.00</b>
<b>Grand Total Income</b>	<b>\$0.00</b>	<b>\$0.00</b>		<b>\$0.00</b>		<b>\$0.00</b>
<b>Grand Total Expenses</b>	<b>\$0.00</b>		<b>\$0.00</b>	<b>\$0.00</b>		<b>\$0.00</b>
<b>Net Income/Loss</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>		<b>\$0.00</b>
<b>Ending Account Balance</b>				<b>\$100,000.00</b>		

**OASFAA EXPENSE REPORT & REIMBURSEMENT REQUEST**

To receive reimbursement for approved OASFAA expenses a reimbursement form should be completed and submitted to the Treasurer within 30 days of incurring the expense.

Expense reimbursement requests should be combined and at a minimum of \$5.00 if possible.

Name: \_\_\_\_\_ Social Security # \_\_\_\_\_

Institution: \_\_\_\_\_ OASFAA Committee: \_\_\_\_\_  
(if applicable)

Expenses Related to Travel on Behalf of OASFAA

Date	Breakfast	Lunch	Dinner	Lodging	Transportation	Cabs/Limos	Other Description	Amount	Daily Total
Totals									

Expenses Related to Materials Purchased for or Services Rendered to OASFAA

Type of Expense:  
(i.e., postage or photocopying)

Amount:  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_

Authorizations:

\_\_\_\_\_  
Treasurer  
\_\_\_\_\_  
Date

President or Past President

\_\_\_\_\_  
Date

Total \$ \_\_\_\_\_

\_\_\_\_\_  
Amt. Reimbursed

\_\_\_\_\_  
Check Number

\_\_\_\_\_  
Date Mailed

By my signature below, I certify that I have not been and will not be reimbursed by any other agency for any amount exceeding the actual cash outlay for this expense.

Total Claim: \$ \_\_\_\_\_

Client's Signature: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

**List of Past Presidents**

1966-1967	H.L. Helton
1967-1968	Leonard Wolfe
1968-1969	Elton Davis
1969-1970	O.J. Collins
1970-1971	Bob Clarke
1971-1972	Don Martin
1972-1973	Peggy Perdue
1973-1974	Phil Brown
1974-1975	Warren Wilson
1975-1976	Odes Massey
1976-1977	John McKinney
1977-1978	Richard Dean
1978-1979	Mary Coffey
1979-1980	Bob Richey
1980-1981	Rhonda Freeman
1981-1982	Archie Gwartney
1982-1983	Jane Davis
1983-1984	Kay Vincent
1984-1985	Karen Pennell
1985-1986	Dave Barrett
1986-1987	Charles Pappan
1987-1988	Charles Bruce
1988-1989	David Horn
1989-1990	Ed Queeney
1990-1991	Larry Hollingsworth
1991-1992	Gary Garoffolo
1992-1993	Sheila Fugett
1993-1994	David Gruen
1994-1995	Gloria Derby
1995-1996	Bill McFarland
1996-1997	Pam McConahay
1997-1998	Pat Kennedy
1998-1999	Sherry Foster
1999-2000	Sherry Foster
2000-2001	Jerome Wichert
2001-2002	Harold Case
2002-2003	Dean Fisher
2003-2004	Vicki Hendrickson
2004-2005	Lee Kanakis
2005-2006	Kristi Emerson
2006-2007	Laura Coponiti
2007-2008	Lynell Armstrong
2008-2009	Andrew Hammontree
2009-2010	Nancy Moats
2010-2011	David Barron



2011-2012	Mendy Schmerer
2012-2013	Becky Garrett
2013-2014	Lori Boyd
2014-2015	Dustin Davidson
2015-2016	Audra Main
2016-2017	Jonna Raney
2017-2018	Karen Jeffers
2018-2019	Alicia Smith

**History of Awards***Philo Brasher Emerging Leadership Award*

1996-1997	Kristi Emerson
1998-1999	Steve Daffer
2002-2003	Laura Coponiti
2004-2005	Lori Perry
2005-2006	Andrew Hammontree
2006-2007	Alicia Smith
2007-2008	Mendy Schmerer
2008-2009	Carol Stanfield
2009-2010	Lori Boyd
2010-2011	Dustin Davidson
2011-2012	Audra Main
2012-2013	Kelly Hicks
2013-2014	Marilyn Schwarz
2014-2015	Lori Frazee
2015-2016	Nancy Vollertsen
2016-2017	Lori Deardorff
2017-2018	Melanie Rinehart
2018-2019	Jonna Raney

*Honorary Membership Award*

1997-1998	Dr. Hans Brisch, Chancellor, Oklahoma State Regents for Higher Education
2009-2010	Tad Jones, Representative, Oklahoma House of Representatives
2015-2016	Pat Kennedy, Oklahoma State University/Department of Education retiree
2016-2017	Pam McConahay, Retired Financial Aid Administrator

*Distinguished Service Award*

2005-2006	Pam McConahay
2006-2007	Marcia Carter
2007-2008	Sherry Foster
2008-2009	Laura Coponiti
2009-2010	Lynell Armstrong
2010-2011	Andrew Hammontree
2012-2013	Nancy Moats
2013-2014	Mendy Schmerer
2014-2015	Myrna Cross
2015-2016	Brad Burnett
2017-2018	Susan Prater
2018-2019	Dustin Davidson

*Partner Award*

2005-2006	David Horn, Oklahoma Student Loan Authority
2006-2007	Ron Hancock, Nelnet
2007-2008	Kelli Kelnar, Oklahoma Guaranteed Student Loan Program
2008-2009	Rick Edington, Oklahoma Guaranteed Student Loan Program

2010-2011	Penny Gandy, Oklahoma College Assistance Program
2011-2012	Irala Magee, Oklahoma State Regents of Higher Education
2012-2013	Carol Alexander, Oklahoma State Regents of Higher Education
2013-2014	Wayne Sparks, Oklahoma College Assistance Program
2014-2015	Denise Sullivan, Discover Loans
2015-2016	Carol Swenson, Great Lakes
2016-2017	Craig Poleman, Inceptia
2016-2017	Karli Greenfield, Oklahoma College Assistance Program
2017-2018	Michelle Enriquez, Citizens Bank
2018-2019	Bryce Fair, Oklahoma State Regents of Higher Education

### **OASFAA Institutional Scholarship Recipients**

Panhandle State University	\$500	1997
Mid-American Bible College	\$500	1998
Woodward Beauty School	\$500	1998
Seminole State College	\$500	1998
Tulsa County A VTS	\$500	1999
Southwest College of Christian Ministries	\$500	1999
Oklahoma State University - Okmulgee	\$500	1999
Cameron University	\$500	1999
Connors State College	\$500	1999
Metro Technology Center	\$500	2000
Southern Oklahoma Technology Center	\$500	2000
Southern Nazarene University	\$500	2000
Tulsa Community College	\$500	2000
Rogers State University	\$500	2000
American Bible College and Seminary	\$500	2001
Canadian Valley Technical Center	\$500	2001
Northwestern Oklahoma State University	\$500	2001
OSU-Oklahoma City	\$500	2001
None given in 2002	\$0	2002
High Plains Technology Center	\$500	2003
Southwestern Oklahoma State University	\$500	2003
Hillsdale Free Will Baptist College	\$500	2003
Autry Technology Center	\$500	2004
East Central University	\$500	2004
Gordon Cooper Technology Center	\$500	2004
State Barber College	\$500	2004
Caddo Kiowa Technology Center	\$500	2005
Langston University	\$500	2005
City College	\$500	2005
OSU-Tulsa	\$500	2005
SW Technology Center	\$500	2006
Career Point Institute	\$500	2006

Western Technology Center	\$500	2006
University of Central Oklahoma	\$500	2006
Oklahoma State University-OKC	\$500	2007
ITT Technology Center	\$500	2007
Oklahoma Wesleyan University	\$500	2007
Northern Oklahoma College	\$500	2008
Gordon Cooper Technology Center	\$500	2008
St. Gregory's University-Shawnee	\$500	2009
Platt College/OK Health Academy	\$500	2009
Moore Norman Technology Center	\$500	2010
Oral Roberts University	\$500	2010
Western Oklahoma State College	\$500	2010
Oklahoma Baptist University	\$500	2010
Northeastern Oklahoma State University	\$500	2011
Oklahoma City University	\$500	2011
Red River Technology Center	\$500	2012
Brown Mackie College	\$500	2013
Red River College	\$500	2013
Wes Watkins Technology Center	\$500	2014
OU-Tulsa	\$500	2014
Indian Capital Technology Center	\$500	2015



**Membership Application Example**



\*Required Field\*

**2011-2012 OASFAA Membership Application**

**Type of Membership:**

Institutional Membership \_\_\_\_\_ Associate Membership \_\_\_\_\_

**Organization Information**

*Institution:*

*Address:*

*City:*

*State:*

*Zip:*

*Phone:*

*Fax:*

Payment of \$100 enclosed: Yes \_\_\_\_\_ No \_\_\_\_\_ (will be sent separately)

Is a receipt necessary? Yes \_\_\_\_\_ No \_\_\_\_\_

**Voting Representative**

*Name:*

*Title:*

*Phone:*

*Email:*

**\*\*See 2nd page to include Active Members' information\*\***

Please make sure the 2nd page is complete so we can update our membership list

Submit application and payment to OASFAA Treasurer: