



Missouri Association of Student Financial Aid Personnel

Policies and Procedures Manual

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Committee on Association Governance and Legal Issues

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

TABLE OF CONTENTS

1. Introduction

1.1 Purpose.....6
1.2 Content6

2. Executive Board

2.1 Meetings6
2.2 Meeting Agendas7
2.3 Meeting Location7
2.4 Meeting Minutes7
2.5 Detailed Officer Descriptions
2.5.1 President8
2.5.2 President-Elect9
2.5.3 Past-President10
2.5.4 Vice-President11
2.5.5 Secretary12
2.5.6 Treasurer13
2.5.7 Treasurer-Elect14
2.5.8 Past-Treasurer15
2.5.9 Delegates-at-Large16

3. Committees

3.1 Standing Committees17
3.2 Committee Chairpersons17
3.3 Ad Hoc Committees17
3.4 Committee Membership18
3.5 Committee Reports18
3.6 Term of Office18
3.7 Standing Committee Descriptions
3.7.1 Archives Committee19
3.7.2 Associate Members Committee20
3.7.3 Association Governance & Legal Issues Committee21
3.7.4 Awards Committee22
3.7.5 Budget and Finance Committee23
3.7.6 Communications Committee24
3.7.7 Corporate Support Committee25
3.7.8 Early Awareness Committee26
3.7.9 Leadership Development Program Committee.....27-28
3.7.10 Legislative Committee.....29
3.7.11 Membership Committee.....30
3.7.12 Newcomer/Welcome Committee31
3.7.13 Nominations & Elections Committee.....32
3.7.14 Professional Development Committee33

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

3.7.15 Program Committee34
3.7.16 Research Committee35
3.7.17 Site Committee36
3.7.18 Technology Committee37
3.8 Special Committees38

4. Guidelines/Policies

4.1 Nominations and Elections39
4.2 Awards40
 4.2.1 Missouri Award41
 4.2.2 Bob Berger Newcomer Award41
 4.2.3 Student Success Story Award42
 4.2.4 Lifetime Membership Award.....43
 4.2.5 Presidents Award43
 4.2.6 Committee of the Year Award44
 4.2.7 Service Awards44
4.3 Membership Directory45
4.4 MASFAP Scholarship46
4.5 MASFAP Website47
4.6 MASFAP Listserv.....48

5. Financial Policies

5.1 Accounts Payable49
5.2 Conference Sponsors and Vendors49
5.3 Internal Controls49
5.4 Reconciliations and Internal Audit.....49
5.5 Investment Policy50
5.6 Officer Travel50
5.7 Reimbursement of Expenses50
5.8 Reserve Fund51
5.9 Revenue and Expenses51
5.10 Stale Checks51
5.11 Vendor, Sponsor, Exhibitor Cancellation and Refund Policy52
5.12 Insurance52
5.13 General Refund52
5.14 Audits52
5.15 Non-Profit Status52
5.16 Treasurer-Elect/Treasurer--General Operating Procedures53

6. General Policies of Conduct

6.1 Campaign Policy56
6.2 Alcohol Policy56
6.3 Contract Signing56
6.4 Code of Conduct56
 6.4.1 Statement of Ethical Principals and Code of Conduct56

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

6.4.2 Resolution of Policy Violations57
6.4.3 How to Report / Lodging a Complaint57
6.4.4 Complaint Evaluation.....57
6.4.5 Hearing and Appeal58
6.4.6 Sanctions59
6.4.7 Additional Notes59
6.5 Removing a Board Member60

7. Statement on the Role of MASFAP61

8. Miscellaneous Information61

8.1 Association Contact Information
8.1.1 Mailing Address
8.1.2 Email Address

8.2 Investment Account and Contact Information62
8.2.1 Build America Bonds
8.2.1 General Banking

8.3 Association Insurance62
8.3.1 Business Owners
8.3.2 Crimeshield
8.3.3 Directors and Officers

8.4 Official Documents62
8.4.1 Location
8.4.2 How to access

9. Forms

9.1 Event/Activity Expense Reimbursement63
9.2 Travel Expense Reimbursement Form
9.3 Debit Card Use Form
9.4 Service Awards Calculation Form
9.5 Budget Request Form
9.6 MASFAP Brochure (2017)
9.7 MASFAP W-9 Form
9.8 Bob Berger Newcomer Award Nomination Form
9.9 Student Success Story Nomination Form
9.10 Membership
9.11 Committee Volunteer Form
9.12 Treasurer's Report
9.13 Statement of Candidacy
9.14 Tax Exempt Status

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

10. Addendums63
10.1 Strategic Plan (2017)

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

1. INTRODUCTION

1.1 Purpose

The MASFAP Policies and Procedures are designed to provide guidance, reference material, and historical continuity for the MASFAP Executive Board and Committee chairpersons.

This document is stored on a computer file for ease of updating and transfer as Executive Board and Committee chairs change. The computer file is maintained by the Past President from information supplied by MASFAP members and approved by the Executive Board.

Each Executive Board member and Committee chairperson is responsible for knowing the content of the MASFAP Policy and Procedures Manual and providing changes and updates, as applicable, to the Past President. The Past President reviews all changes for legality, consistency, and clarity and makes appropriate proposals for Executive Board action. Upon approval, the Past President incorporates the changes into the document.

Updates to the MASFAP Policy and Procedures Manual are printed and distributed to members of the Executive Board as changes occur, and will be maintained on the MASFAP website.

1.2 Content

The MASFAP Policy and Procedures Manual supplements the Articles of Incorporation and Constitution and Governing By- Laws by:

1. Providing an overview of the Association's structure.
2. Describing the responsibilities of members in leadership positions.
3. Presenting the Association's approved operating policies and procedures.

2. EXECUTIVE BOARD

2.1 Meetings

1. The Executive Board will meet not fewer than four times during the calendar year—historically, meetings are held in January, March, June, November (Fall Conference).
2. The time and place of meetings will be the decision of the President.
3. Committee chairpersons must attend all Executive Board meetings or may designate an approved proxy, as needed.

2.2 Meeting Agendas

Meeting agendas are prepared by the President. Items to be placed on the agenda should be given to the President and Secretary prior to the scheduled meeting.

Regular reports to the Executive Board are to be made by the Treasurer and Committee chairpersons. Written reports are to be prepared ahead of time for distribution.

2.3 Meeting Location

Location of Executive Board meetings is determined by the President. The meeting held in conjunction with the association conference is at the conference site.

2.4 Meeting Minutes

Minutes of each Executive Board meeting will be distributed by the Secretary within four weeks after the meeting.

1. The name of the person making a motion should be included in the minutes.
2. Board reports are not required to be included in meeting minutes. The minutes should provide a summary of what is discussed. The Secretary may copy information from the board report to help supplement the meeting notes.
3. Board reports should be archived.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

2.5 Detailed Officer Descriptions

2.5.1 PRESIDENT

Basic Responsibility:

Acts as chief executive officer of the Association presides at all meetings of the Association and chairs all meetings of the Executive Board.

Duties and Responsibilities:

1. Provide leadership and direction to all activities of the Association, Executive Board, and all committees.
2. Provide fiduciary oversight of the Association.
3. Serve as the official representative and spokesperson of the Association and Executive Board, or delegates such responsibility to another officer or member of the Executive Board.
4. Call and preside at all meetings of the Association or Executive Board.
5. Appoint all Committee chairpersons subject to approval of the Executive Board and serves as ex-officio member of all committees.
6. Submit an annual report to the general membership at the annual meeting.

Length of Term:

The President-Elect automatically becomes President of the Association. The term of office is one calendar year, beginning January 1st and ending December 31st; however, ceremoniously begins with the passing of the gavel, typically occurring annually in November. The President will subsequently serve for one year as immediate Past President; thus a three year commitment.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

2.5.2 PRESIDENT-ELECT

Basic Responsibility:

The President-Elect is an elected officer of the Association and performs the duties of the President in the event of absence or incapacity of the President and shall perform such duties as assigned by the President or prescribed by the Executive Board.

Duties and Responsibilities:

1. Provide assistance to the President in any area as requested.
2. Propose a fiscal year operating budget for approval by the Executive Board by the final meeting of the year.
 - a. Collaborate with Budget and Finance Committee to project estimated conference registration fees and other expenses when developing budget.
3. Represent the Association on the Executive Council of the Midwest Association of Student Financial Aid Administrators (MASFAA).
 - a. Timing of this appointment will align with MASFAA'S annual calendar; and may be as soon as the month of August immediately following the MASFAP election.
 - b. Attend MASFAA annual meeting. Expenses not covered by MASFAA will be paid by MASFAP.
4. The President-Elect is encouraged to attend the NASFAA Leadership Retreat and represent MASFAP at the NASFAA annual meeting. All expenses will be paid by MASFAP.
5. Act as host to MASFAA guest at annual conference.
6. Prepare welcome gift for special guest(s), in collaboration with President.

Length of Term:

The President-Elect shall serve for one calendar year after election, beginning January 1st and ending December 31st, and will assume the position of President the following year. The President will subsequently serve for one year as immediate Past President; thus a three year commitment.

2.5.3 PAST PRESIDENT

Basic Responsibility:

The Past President is an officer of the Association and shall perform such duties as are assigned by the President or prescribed by the Executive Board.

Duties and Responsibilities:

1. Chair the Association Governance and Legal Issues Committee
2. Chair the Nominations & Elections Committee.
3. Conduct an annual review of the Association's legal documents and update as necessary.
4. Facilitate the payment of all legal obligations, including: ASCAP, insurance policies, and maintenance of State of Missouri's not-for-profit status Fee Agent.

Length of Office:

The Past President shall serve for one calendar year beginning with the conclusion of term as President, thus a three year commitment. In the event of a vacancy of the president and president-elect, the past-president shall fill in until a special election can be held.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

2.5.4 VICE PRESIDENT

Basic Responsibility:

The Vice President is an elected officer of the Association and shall serve as chairperson of the Program Committee.

Duties and Responsibilities:

1. Plan the program for association conferences.
2. Select the Program Committee from association membership.
3. Work with the Site chairperson on physical arrangements of the program.
4. Work with the Corporate Support chairperson on vendor support for the conferences.
5. Collaborate closely with President to ensure successful conference.

Length of Term:

The Vice President shall serve for one calendar year after election, beginning January 1st and ending December 31st.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

2.5.5 SECRETARY

Basic Responsibility:

The Secretary is an elected officer of the Association and is responsible for recording, distributing and maintaining records of the Association.

Duties and Responsibilities:

1. Record minutes of Executive Board and general membership meetings.
2. Distribute minutes of Executive Board to Board members within four weeks after the meeting.
3. Maintain official Association stationary.
4. Perform duties as assigned by the President or Executive Board.

Length of Office:

The Secretary shall serve for one calendar year after election, beginning January 1st and ending December 31st.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

2.5.6 TREASURER

Basic Responsibility:

The Treasurer is responsible for developing, distributing and maintaining the financial records of the Association and the Executive Board. The Treasurer shall provide the Executive Board financial records as requested, and process payments in a timely manner.

Duties and Responsibilities:

1. Maintain fiscal records and manage fiscal affairs of the Association.
2. Assist in preparing the annual operating budget.
3. Prepare a fiscal report for the annual conference.
4. Disburse monies of the Association.
5. Pay bills owed by the Association.
6. Maintain adequate and appropriate records of all financial transactions of the Association.
7. Prepare and file annual tax returns.
8. Cooperate with annual auditors of the Association.
9. Serve as a member of the Budget and Finance Committee.

Length of Term:

The Treasurer-Elect automatically becomes Treasurer of the Association. The term of office is one calendar year, beginning January 1st and ending December 31st. The Treasurer will subsequently serve for one year as Past-Treasurer and Chair of Budget and Finance Committee; thus a three-year commitment.

See Section 5. Financial Policies for more information

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

2.5.7 TREASURER-ELECT

Basic Responsibility:

The Treasurer-Elect is an elected officer of the Association and serves as an assistant to the Treasurer while training to assume the duties of the Treasurer when the Treasurer's term expires.

The Treasurer-Elect receives all monies of the Association and processes in a timely manner.

Duties and Responsibilities:

1. Serve as a member of the Budget and Finance Committee.
2. Carry out duties as assigned by the Treasurer or Executive Board.
3. Complete the unexpired term of the Treasurer should a vacancy occur.
4. Collect membership dues and relay membership information to the Membership Committee.
5. Collect conference registration fees and relay attendance information to the Membership Committee and Program Committee.
7. Attend the NASFAA Leadership and Legislative Conference for specific treasurer related training. All expenses will be paid by MASFAP.
8. Collect corporate support donations and reconcile accounts with the Corporate Support Chair.

Length of Term:

The Treasurer-Elect shall serve for one calendar year after election, beginning January 1st and ending December 31st, and will assume the position of Treasurer the following year. *The Treasurer will subsequently serve for one year as Chair of Budget and Finance Committee; thus a three year commitment.

See Section 5. Financial Policies for more information

2.5.8 PAST-TREASURER

Basic Responsibility:

The Past-Treasurer is an elected officer of the Association.

Duties and Responsibilities:

1. Serve as Chair of the Budget and Finance Committee
2. Oversee the preparation, implementation and management of budget
3. Supervise the reconciliation process of the Association's accounts
 - a. Provide oversight of all deposits and checks written and monitor stale checks.

Length of Term:

The Past-Treasurer automatically serves for one calendar year after serving the positions of Treasurer, thus a three year commitment.

See Section 5. Financial Policies for more information

2.5.9 DELEGATES-AT-LARGE (4)

Basic Responsibility:

The Delegates-At-Large are elected officers of the Association and represent the membership of the association. Their basic responsibility is to perform duties as directed by the Executive Board.

Duties and Responsibilities:

1. Three of the delegates will represent the institutional membership, and one will represent the associate membership.
2. Collect concerns and suggestions from the membership and share with the Executive Board.
3. Participate in the meetings and activities of the Executive Board and contribute to the formulation of policies and procedures of the Association.
4. Conduct annual reviews of the Association's financials for internal auditing purposes.
5. Serve as point of contact and reporter for violations of the Association's Constitution and Governing By-Laws and Policies and Procedures, as in compliance with the Resolution of Policy Violation policy (6.4.2)
6. Perform such duties as assigned by the President or Executive Board.

Length of Term:

Each Delegate at Large shall serve for three (3) consecutive years, beginning January 1st and ending December 31st. Institutional delegates shall serve on a three-year rotation; thus each year a new institutional delegate must be elected.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

3. COMMITTEES

3.1 STANDING COMMITTEES

Standing committees are permanent, required and named by the Constitution and Governing ByLaws.

These committees are:

- Archives Committee
- Associate Membership Committee
- Association Governance & Legal Issues Committee
- Awards Committee
- Budget and Finance Committee
- Communications Committee
- Corporate Support Committee
- Early Awareness Committee
- Leadership Development Program Committee
- Legislative Committee
- Membership Committee
- Newcomer/Welcome Committee
- Nominations & Elections Committee
- Professional Development Committee
- Program Committee
- Research Committee
- Site Committee
- Technology Committee

3.2 COMMITTEE CHAIRPERSONS

Committee chairpersons will be responsible for:

1. Carrying out the duties and responsibilities of their assigned/appointed committee
2. Reviewing the Constitution and Governing By-Laws and Policies and Procedures and making relevant recommendations, when needed.
3. Replying to members of MASFAP who express interest in serving on the committee.
4. Administering the budget in keeping with MASFAP fiscal procedures.
5. Attending and reporting on committee activities to the Executive Board.

3.3 AD HOC COMMITTEES

Ad Hoc Committees may be appointed by the President for the duration of his/her term.

3.4 COMMITTEE MEMBERSHIP

Committee membership is open to all members of the Association. Membership representation should be sensitive to having representation from all sectors.

Committee chairpersons are recommended to the Executive Board by the President for approval; and may be reappointed for additional terms.

Committee members are recommended to the Executive Board by the committee chairperson for approval.

3.5 COMMITTEE REPORTS

Committee reports are prepared in advance and presented at each Executive Board meeting. Year-end reports of the committee's work will be submitted to the President at the end of the year.

3.6 TERM OF OFFICE

Committee chairs and members shall serve January 1 through December 31, and are welcome to volunteer for additional terms.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

3.7 STANDING COMMITTEE DESCRIPTIONS

3.7.1 ARCHIVES COMMITTEE

PURPOSE: The Committee will be responsible for keeping a historic record of the Association's functions, events, and documents.

SPECIFIC RESPONSIBILITIES:

1. Receive documents, reports, newsletters, photographs, and artifacts from members of
2. MASFAP and compiling them in the archives.
3. Provide articles to the MASFAP Monitor, based on materials in the archives.
4. Prepare displays at Association events featuring materials in the archives, as requested.
5. Photograph events/activities at Association functions, or delegate responsibility to attending party.
6. Responsible for collecting and preserving historical information and documents each year, including, but not limited to:
 - a. List of all Executive Board members, including name of position held, institution and job title.
 - b. Committee Reports, Treasurer Reports, and Minutes from all Executive Board Meetings.
 - c. Minutes and Treasurer's Report from annual Business Meeting held at conference.
 - d. Annual conference program
 - e. Copy of President's Annual Report
 - f. Memorabilia issued from the Association
 - g. List of all events sponsored by the Association (i.e. Professional Development and Early Awareness activities).
 - h. Copy of historical numbers (membership and conference statistics)
 - i. List of all award recipients
 - j. Physical copies of the monthly communications and quarterly MASFAP Monitor
 - k. Annual Membership Directory
 - l. Electronic copy of pictures taken at events
7. The location of the physical archives must be accounted for on an annual basis, reported to the Association Governance Committee.
 - a. The archives currently (2018) reside in the Financial Aid Office at Moberly Area Community College, 101 College Avenue, Moberly, MO 65270.

3.7.2 ASSOCIATE MEMBERS COMMITTEE

PURPOSE: The Committee shall assist in the establishment and maintenance of effective relationships between postsecondary institutions, and financial aid/bursar - related agencies, lending institutions, guarantee agencies and other organizations engaged in the administration of student financial aid programs and other higher education initiatives.

SPECIFIC RESPONSIBILITIES:

The Committee shall help establish programs to facilitate the exchange of information and ideas among Institutional and Associate members of the Association.

3.7.3 ASSOCIATION GOVERNANCE & LEGAL ISSUES COMMITTEE

PURPOSE: The Committee will advise the Executive Board regarding the Association's Constitution and Governing By-Laws, purposes, etc. It shall also research and advise the Executive Board on legal issues and matters.

MEMBERSHIP: The Committee is chaired by the Past President. Other standing members include: the President, President-Elect, Treasurer, and two past presidents. Other members of the Association are welcome to volunteer (a maximum of two may be selected).

SPECIFIC RESPONSIBILITIES:

1. Research and advise the Executive Board on any legal issues or situations presented to them.
2. Review and maintain the Association's ASCAP license (Acct#500593379).
3. Review and maintain the Association's insurance policies.
4. Maintain the Association's Missouri Non-Profit status
 - a. Submit report to Secretary of State Office by August 31 each year.
5. Revise and maintain the Association's Policies and Procedures Manual
 - a. Collect changes/updates from Executive Board members and Committee Chairs for the manual.
 - b. Maintain the manual in a computer format for ease of updating and transfer of data.
 - c. Distribute updates to the members of the Executive Board as changes occur.
 - d. Collect amendments to the Association's Constitution and Governing By-Laws to be taken before membership to be voted upon.
6. Maintain, review, and revise as needed the Association's strategic plan.
7. Consider instances of member violations of the Association's Constitution and Governing By-Laws and Policies and Procedures, as referred by the Delegates-At-Large and/or the Site Chair. Determine if additional action needs to be taken. Provide guidance to the Executive Board on the matter at hand.

3.7.4 AWARDS COMMITTEE

PURPOSE: The Committee will recognize those members who have made significant contributions to the Association and the financial aid profession.

SPECIFIC RESPONSIBILITIES:

1. Review areas for awards, and coordinate with other Association members, as needed, according to the Association's award guidelines (see Awards Policy 4.2)
2. Coordinate, review, and create and/or purchase appropriate commemoration for each award.
3. To recognize Association's award recipients, announcements may be made via MASFAP listserv, MASFAP Monitor, or other communication tools used by the Association.
4. Responsible for assisting with award dissemination at annual conference.

For a complete list of all MASFAP Awards, with descriptions and guidelines for each, see Policy 4.2.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

3.7.5 BUDGET AND FINANCE COMMITTEE

PURPOSE: The Committee is responsible for all financial matters of the Association including budget preparation.

MEMBERSHIP: The Committee will be chaired by the Past-Treasurer. Other standing members include the Treasurer, Treasurer-Elect, President, President-Elect and Corporate Support Chair, and Site Chair. The incoming Treasurer-Elect is encouraged to join this committee after the election. Other members of the Association are welcome to volunteer (a maximum of two may be selected).

SPECIFIC RESPONSIBILITIES

1. Collaborate with the President-Elect to prepare, implement and manage the operating budget each calendar year. (Collaborate with President-Elect to project estimated conference registration fees and other expenses when developing budget.)
 - a. Inform committee chairs of budget request deadline dates.
 - b. Review and consider Budget requests from committee chairs will be reviewed and considered for inclusion in the next year's proposed budget
 - c. Present proposed budget at the November Executive Board Meeting for approval.
 - d. Current Executive Board will approve the operating budget for the next year at November meeting.
 - e. Operating budget will be in place as a guideline for the officers and committee chairs on January 1.
 - i. Operating budget should be flexible and allow for changes.
 - f. Requests for changes in the budget during the operating year should be made through the Committee and presented to the Executive Board for approval.
 - g. Monitor all committees' adherence to budget guidelines.
2. Oversee administration of the MASFAP Scholarship and ensure at least one scholarship is awarded at the annual conference.
3. Review relationship with CPA firm used to prepare annual tax return, and determine if it is serving the best needs of the Association.
4. Review all reimbursement requests of \$750 or more (see Policy 5. 3). The committee must approve before payment will be issued.

See Section 5. Financial Policies for more information

3.7.6 COMMUNICATION COMMITTEE

PURPOSE: To formulate and distribute the organization Association's newsletter and blog, as well as help with communication to the membership in general.

SPECIFIC RESPONSIBILITIES:

1. Recommended publication dates for Association's newsletter, MASFAP Monitor, are January, April, July and October with other monthly updates to the membership as needed.
 - a. Solicit from the membership, news items to be included in the publication.
 - b. Arrange for formatting and posting the newsletter to the MASFAP web site.
2. Coordinate and post blogs from the board and membership.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

3.7.7 CORPORATE SUPPORT COMMITTEE

PURPOSE: The committee acts as the liaison between the association and vendors and/or sponsors interested in exhibiting, advertising or donating funds at conferences/activities of the association. There are four available categories in which to donate: exhibit, advertising in the program, advertising on the web, or direct donation to MASFAP. Additional opportunities will be considered upon request.

SPECIFIC RESPONSIBILITIES:

1. Serve on the budget and Finance Committee
2. Coordinate with Treasurer-Elect to reconcile accounts and payments received.
3. Pre-conference duties:
 - a. Check solicitation list for accuracy and completeness.
 - b. E-mail/post annual solicitation in fall for following year commitments. Finalize participation of vendors and sponsors. Contact appropriate representative if necessary.
 - c. Provide Technology Committee with solicitation form for posting to MASFAP website.
 - d. Collect exhibition/sponsor forms and produce an excel spreadsheet of funds to collect. Forward to MASFAP Treasurer once completed.
 - e. Donations/Payments should be collected by the MASFAP Treasurer-Elect ONLY.
 - f. Provide Program Committee Chairperson with list of vendors and sponsors and donors with their logos for printing in the conference program.
 - g. Assign vendor tables. Assignment is across the room from right to left in order of receipt of exhibition forms.
 - h. Provide Site Chair with outline of vendor table assignments, phone line needs and other required vendor needs.
 - i. Make nametags for each vendor for placement on the table assigned to them in the exhibit area, along with posted list on doors of exhibit.
 - j. Each fall prepare letter of appreciation to be sent to the President or CEO of all endorsers/sponsors on behalf of the Executive Board, with Board approval.
 - k. Serve on Program Committee and Associate Member Committee.
 - l. Distribute vendor evaluation forms.
4. Duties at the conference:
 - a. Prior to assigned set-up time on the first day of the conference, insure that the vendor area is set up as needed, that shipped materials are placed at the appropriate booths, and name tags are placed on assigned tables. Remain in the exhibition area to provide assistance as needed.
 - b. Place sponsorship signs, table tents and exhibit hours at correct locations.
 - c. Acknowledge exhibitors, advertisers and donors at each conference.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

3.7.8 EARLY AWARENESS COMMITTEE

PURPOSE: The Committee will develop financial aid early awareness projects aimed at all students, schools, and community groups in the state of Missouri, including collaborating with the Missouri Department of Higher Education in organizing and conducting annual College Goal Sunday events (known as “FAFSA Frenzy” since 2009).

SPECIFIC RESPONSIBILITIES:

1. Conduct presentations and workshops to educate community groups
2. Conduct outreach activities supporting student access and success within postsecondary education, such as:
 - a. NT4CM workshops for high school counselors (NT4CM is a program offered by the U.S. Department of Education)
 - b. Reality Stores
 - c. FAFSA Frenzy events
 - d. Exhibiting, as appropriate, at conferences such as the Missouri School Counselors Association (MSCA)
 - e. College for a day events
3. Maintain, enhance, and promote the Show Me to College events and resources database
4. A member of the Early Awareness Committee shall serve as the Association’s representative for the Missouri College Relations Committee.

3.7.9 LEADERSHIP DEVELOPMENT PROGRAM COMMITTEE

PURPOSE: The Committee shall develop and implement a program to develop future leaders for the Association. Through this program, the select participants will acquire the skills and familiarity to ensure the ongoing viability of MASFAP and its ability of effectively delivering mission-centered training and benefits to its members. This program also represents an exceptional professional development opportunity for those seeking advancement and leadership training in the financial aid profession.

Recognizing the need to sustain a qualified and capable pool of members to serve on committees, as committee chairs, or officer positions, the 2014-2015 MASFAP Executive Board explored ways to ensure the continuity of leadership; and, as a result, the Leadership Development Program was created as an ad-hoc committee. In 2018, the MASFAP Executive Board and MASFAP Membership voted to make the Leadership Development Program a permanent standing committee of the Association.

The MASFAP Leadership Development Program is open to institutional members interested in increasing their involvement in the area of association leadership at the state or regional level.

SPECIFIC RESPONSIBILITIES:

1. The committee chair will coordinate application and selection process.
 - a. Announcements and applications are typically released to the membership via the MASFAP Listserv in late summer or early fall.
 - b. Participants will be selected by the League of MASFAP Presidents (Past, Present, Elect). The Presidents will seek representation from a cross-section of the Association with diversity and balance in areas such as institution type and individual attributes.
 - c. Selection criteria will be based on the applicant's own merits as presented in the application and supporting documents.
 - d. The Presidents will look for:
 - i. Evidence of commitment to the profession of financial aid and previous attendance and involvement in the association;
 - ii. Expressed desire to pursue involvement in state or regional association leadership positions;
 - iii. Ability to make time commitment throughout the year;
 - iv. Applicants must demonstrate the full support of their direct supervisor and employer. Applicants must provide evidence that the employer will allow time for participation including conference calls, off-site meetings, and financial support for attendance at the MASFAP Fall Conference.
 - e. Applicants will be informed of their acceptance status typically by the first week of October, preceding the MASFAP Fall Conference.
 - i. Applicants will be notified via email from the President, or designee.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

2. The Leadership Development Program launches at the annual MASFAP Conference and concludes at the annual Conference the following year.
 - a. A brief orientation will be held following the close of the conference.
 - i. The tentative calendar for the year will be developed
 - b. Program participation will conclude with involvement at the following annual conference.
3. The curriculum will be fluid based on the recommendations and guidance received from the League of Presidents. The format may include, but is not limited to:
 - a. MASFAP's history
 - b. How to be an effective committee volunteer and chairperson
 - c. Leadership training
 - d. Informational readings
 - e. Group discussions
 - f. Advocacy and legislative research
 - g. Group projects
4. Participants will be paired with a seasoned MASFAP mentor and the mentee/mentor relationship is intended to enhance and solidify the experience in the program.
 - a. Those selected to participate are encouraged to attend the MASFAP Fall Conference to be recognized
 - b. A brief orientation will be held following the close of the conference.
 - i. The calendar for the participation year will be developed

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

3.7.10

LEGISLATIVE COMMITTEE

PURPOSE: The Committee is to serve as liaison for the Association with federal, state and local governmental organizations, which directly impact financial aid, institutions and students.

SPECIFIC RESPONSIBILITIES:

1. Maintain constant communication with federal and state lawmakers regarding pending and current legislation that affects the Association.
2. Evaluate pending and current legislation to predict the effect for students and educational institutions and relay information to the membership.
3. Maintain ongoing contacts with state and national assemblies in order that new ideas, projects and problems concerning present and proposed legislation can be voiced.
Coordinate legislative advocacy activities
4. **Coordinate “Hill Day” events in Jefferson City to maintain visibility and contact and build relationship with state legislators.**

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

3.7.11 MEMBERSHIP COMMITTEE

PURPOSE: The committee shall seek out institutions and organizations in Missouri who are not members of the Association and solicit their participation for institutional or associate membership.

SPECIFIC RESPONSIBILITIES:

1. Conduct an annual review and update of IPEDS total enrollment numbers as to assess the correct membership dues.
2. Maintain the membership database housed on the Association's website and send out membership renewal notices via email or mail on an annual basis.
3. Identify and verify new members who are attending an association conference for the first time.
4. Provide years of service information to the awards committee.
5. Provide conference nametags for registered and special guests to the Program Chair and provide a list to the Treasurer-Elect.
6. Maintain the master historical data of paid institutional memberships, paid associate member memberships, membership renewed but not paid, memberships not renewed and conference attendees.
7. Review membership categories approved in the Constitution and Governing By-Laws and make recommendations as needed to provide relevant membership opportunities for professionals working in the financial aid industry.

3.7.12 NEWCOMER/WELCOME COMMITTEE

PURPOSE: The Newcomer Committee is responsible for welcoming new members into MASFAP. The Newcomers Committee orients new members to MASFAP and conveys the importance of serving on MASFAP committees and holding leadership positions.

SPECIFIC RESPONSIBILITIES

1. Provide networking opportunities for new members with existing members.
2. Send communications to new financial aid professionals and new MASFAP members to ensure they are welcomed into the Association.
3. The Committee chair will also serve as a member on the Program Committee.
 - a. The prior Committee chair is encouraged to serve as a member.
4. Responsibilities at the annual conference include:
 - a. Plan and provide a Newcomer session.
 - b. Plan and host Newcomer activities.
 - c. Communicate information regarding the conference to new members.
 - d. Coordinate with the Vice President to help organize the program for each conference.
5. Collaborate with the Awards Committee Chair, to promote and award the Bob Berger Newcomer Award. See Policy 4.2.2 for guidelines.

3.7.13 NOMINATIONS & ELECTIONS COMMITTEE

PURPOSE: The committee shall prepare a slate of nominees for the elected offices of MASFAP, and conduct election of officers.

MEMBERSHIP: The chairperson is the Past President of the Association. The chairperson shall select five committee members who represent all sectors of the membership, i.e.; public schools, private schools, associate member institutions, and other types as identified by the chairperson.

SPECIFIC RESPONSIBILITIES:

1. Solicit nominations for officers from the membership.
2. Finalize the slate of officers for publication on the MASFAP website.
3. Solicit candidacy statements from each nominee.
4. Publish candidacy statements on the website.
5. Coordinate the electronic voting process with the Technology Chair.
6. Announce the election results 15 days after the ballot is made available for voting.

See General Policies - Policy on Nominations and Elections, Section 4.1

3.7.14 PROFESSIONAL DEVELOPMENT COMMITTEE

PURPOSE: The Committee shall coordinate training events, which provide the membership current and pertinent information regarding any area of financial aid programs.

SPECIFIC RESPONSIBILITIES:

1. Arrange training for members of the Association.
2. Coordinate any National or Regional training series held in Missouri.
3. Arrange other professional development programs as planned by committee.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

3.7.15 PROGRAM COMMITTEE

PURPOSE: The Committee is to plan and execute the programs for the annual conferences of the Association.

MEMBERSHIP: The Committee is chaired by the Vice President of the Association. Committee members are selected by the chairperson. Consideration should be given to representation from all sectors of the Association. In addition, the Site Chairperson, the Corporate Support Chairperson serve as members; the Past Vice President and the incoming Vice President are encouraged to serve as members, as well.

SPECIFIC RESPONSIBILITIES:

1. Select the theme of the conference
2. Provide Interest sessions for all sectors
3. Procure keynote speakers
4. Coordinate with Budget and Finance Committee and Corporate Support Committee on hospitality/entertainment
5. Coordinate registration for the conference
6. Coordinate printing of programs and registration materials
7. Arrange payment of honorariums to guest speakers.
8. Provide a list of audio-visual equipment needed to the Site Chairperson.
9. Establish a process and evaluate the conference program.
10. Collaborate with Site Committee Chair about compensatory rooms for special guests. 11. Collaborate with President and Budget and Finance Committee Chair to construct a Budget for conference planning.

3.7.16 RESEARCH COMMITTEE

PURPOSE: The Committee, through consultation with the Executive Board, determines the areas of research that are most needed and then implements that research.

SPECIFIC RESPONSIBILITIES:

1. Suggest research topics to the Executive Board, as needed.
2. Provide research assistance to the various committees within the Association, as requested.
3. Communicate research findings to the the Association membership within six months of the completion of the research (sooner if necessary).

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

3.7.17 SITE COMMITTEE

PURPOSE: The Committee is to make all site arrangements with regard to the conference, **trainings**, association meetings, and Executive Board Meetings held throughout the year.

SPECIFIC RESPONSIBILITIES:

1. Liaison between the Program Committee and the conference site.
2. Sign all contracts and bills regarding conference site expenses and arrangements.
3. Coordinate the arrangements for all association meetings.
4. Liaison between the President and committee chairs when scheduling meetings at the conference site.
5. Serve as point of contact and reporter for violations of the Association's Constitution and Governing By-Laws and Policies and Procedures, as in compliance with the Resolution of Policy Violation policy (6.4.2)
6. Member of the Program Committee and Budget and Finance Committee.
7. Member of the Executive Board. Solicits bids from new conference sites as directed by the Executive Board
8. Assure committee is represented at annual conference to facilitate conference logistics and to ensure no issues arise.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

3.7.18 TECHNOLOGY COMMITTEE

PURPOSE: Shall oversee the technological needs of the Association.

SPECIFIC RESPONSIBILITIES:

1. Assure that the MASFAP website is maintained and updated on a timely basis. This should be accomplished through regular meetings with the Technology Chair.
 - a. Collaborate with the Nominations and Elections Committee to prepare electronic ballot
 - b. Collaborate with Program Committee to prepare conference information site and registration. Assist with the Program Committee's Audio Visual needs at annual conference,
 - c. Maintain various email groups used for communication (i.e. Budget and Finance Committee, Leadership Development Program, etc.)
 - d. Maintain various lists published on website (i.e. Executive Board, Award Recipients, Past-President, etc.)
 - e. Collaborate with President to post documents and historical data on website's official documents page
 - f. Annually clear volunteer database immediately before the annual conference.
2. Provide training to the membership as necessary and respond to questions relating to-the Association's website.
3. Provide training to Executive Board for officer and committee chair capabilities.
4. Review Website and Listserv Policies and make recommendations as needed.

Historical Note: Transitioned the MASFAP website from ATAC to Memberclicks in 2019.

3.8 SPECIAL COMMITTEES

Special committees may be proposed by any designated representative of the Association and may be created by a simple majority of the designated voting representatives of the board. Creation of such committees, their jurisdiction, and the number of members selected and the tenure of the committees and members shall be the responsibility of the members of the Association and shall be made a matter of record in the minutes of the Association.

4. GUIDELINES

4.1 POLICY: NOMINATIONS AND ELECTIONS

1. The Nominations and Elections Committee is established in accordance with the Association's Constitution and Governing By-Laws.
2. Selection of Members: Selection of five committee members is made by the chair (Past President of the Association) with approval of the Executive Board, no later than the Executive Board meeting held in March. All sectors of the Association should be represented.
3. Annual Meeting: The annual meeting of the Nominations and Elections Committee should be held in the spring to make plans for the general election held online.
4. Call for Nominations: March-April
 - a. Each committee member is responsible for soliciting nominees for available positions.
 - b. The Chair will delegate solicitation assignments to committee members, as needed.
5. Finalize slate of officers for publication on the web site: April
 - a. The Chair and members of the Nominations and Elections Committee will cooperatively develop a slate of nominees for available positions.
 - b. All candidates must have personally accepted and have been notified of, and agreed to abide by, the rules of elections as described in the MASFAP Constitution and Governing By-Laws and Policies and Procedures Manual.
 - c. All candidates must have institutional approval.
6. Candidacy Statements: April
 - a. The Chair must solicit a short candidacy statement from each candidate running for office.
7. Collaborate with website via the Technology Committee Chair to prepare the ballot and conduct ballot testing with members of the Committee.
8. Preparation of Candidacy Statements: April
 - a. Candidacy statements and ballots are displayed on the website.
9. General Election: May
 - a. The voting process is conducted electronically through the Association's website.
 - b. Voting may be held not sooner than May 1 and not later than May 31, annually. Electronic ballot for voting members will remain open for 15 days. The winners of the election are announced electronically.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

4.2 POLICY: AWARDS

Awards are established in accordance with the Association's Constitution and Governing By-Laws and Policies and Procedures; and/or as approved by the Executive Board.

1. A list of the Association's awards shall be maintained in this section of the Policies and Procedures, including a description, selection criteria, and awarding procedures for each.
 - a. Additional award areas are determined by the Awards Committee, and are approved by the Executive Board.
2. The Awards Committee is responsible for coordination of all awards annually, in accordance with the procedures outlined for each Award listed below.
3. All awards will be presented at the annual conference, unless otherwise not required per specific Award guidelines.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

4.2.1 Missouri Award

The Missouri Award is MASFAP's highest honor and recognizes an individual who has demonstrated outstanding leadership and service throughout their financial aid related career.

The Awards Committee Chair will appoint a prior Missouri Award recipient to coordinate the nominations, selection and presentation process each year.

Prior recipients of the Missouri Award will serve as the review panel. A list of previous recipients is provided on the Association's website. The Coordinator must verify current contact information with all past recipients and add most recent recipient to the list.

Nominations are solicited from the MASFAP membership. Final selection is made by the review panel.

The Coordinator is responsible for ordering the recognition plaque in collaboration with the Awards Chair. The coordinator should make necessary arrangements to maintain mystery of recipient.

The Missouri Award is presented at the annual meeting. NOTE: this award does not have to be awarded annually.

4.2.2 Bob Berger Newcomer Award

This award is intended to recognize the outstanding contributions of individuals new to the financial aid profession. It is presented in honor of the late Mr. Bob Berger, former Director of Student Financial Aid at Missouri Western State University. Bob's service in the financial aid community began in 1971 and until his untimely death in April 2002; Bob ensured that students were the focus of his career. He believed and exemplified that a student's success in education is paramount in the financial aid industry. Bob also believed in the professional development of his staff and the MASFAP community so that we may act as advocates for the student – just as he did. This award will serve as a reminder of Bob's legacy to both MASFAP and the entire student financial aid profession.

To be considered for this award, each candidate must meet the following criteria:

- Be an institutional MASFAP member who is a first time financial aid professional. This administrator must have been in the profession for less than five years (as of January 1).
- Have made outstanding contributions at the institutional, regional, state, and/or national levels
- Strive to keep students' interest his/her first priority

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

- Be dedicated to providing professional development to others and for themselves to better assist students
- Give back to the financial aid community
- Demonstrate leadership by participating in and supporting student aid related activities and programs

The award will be bestowed at the fall MASFAP Conference. The chosen recipient(s) will receive a paid MASFAP conference registration along with a token of appreciation from the MASFAP organization.

Nominations must include a letter of recommendation highlighting the Bob Berger attributes of the nominee, and are submitted by email to the Newcomer Committee Chairperson and/or appointed coordinator beginning July 1 and ending no later than October 1 prior to the subsequent fall conference.

The Newcomer Committee Chair will appoint a prior Bob Berger Newcomer Award recipient to coordinate the nominations, selection and presentation process each year.

Prior recipients of the Bob Berger Newcomer Award will serve as the review panel. Nominators must recuse themselves from the review panel. A list of previous recipients is provided on the Association's website. The Coordinator must verify current contact information with all past recipients and add most recent recipient to the list.

Nominations are solicited from the MASFAP membership. Final selection is made by the review panel.

The Coordinator is responsible for ordering the recognition plaque in collaboration with the Newcomer Chair and the Awards Chair. The coordinator should make necessary arrangements to maintain mystery of recipient.

The Bob Berger Newcomer Award is presented at the annual meeting. NOTE: this award does not have to be awarded annually.

4.2.3 Student Success Story Award

This award is intended to focus on individuals while symbolizing the real purpose of financial aid, which is to provide the means to pursue and realize a postsecondary education. One award may be presented each year.

The Association is not attempting to select the "most successful" former financial aid recipients, but rather to choose people who can be representatives of all aid recipients who are successful. Each nominee for the Student Success Story must meet the following qualifications:

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

1. The nominee must hold a degree or certificate of completion from a post-secondary educational institution within the state of Missouri, which is an eligible institution for U.S. Department of Education Title IV student assistance programs.
2. The nominee must have received financial assistance while enrolled at the institution.
3. The nominee currently either must be engaged in vocational or professional activity, or be enrolled in a graduate or professional school. Preference will be given to nominees who are not practicing aid administrators.
4. The recipient must be able and willing to attend the awards ceremony. (The Awards Committee will contact recipients and make necessary travel arrangements.)

MASFAP is dedicated to serving students. Therefore, it is fitting that the Association honors students who are successful financial aid recipients and, and in so doing, honors all students who needed aid, received aid, and used aid to achieve success.

All members of the Association are eligible to submit a nomination. The Awards Committee will evaluate each nomination and hold discussion on the merits of each potential recipient. The Awards Committee shall have the prerogative to request additional information if necessary. The final selection will be based on the concept of what the award is intended to represent.

The Student Success Story recipient will be announced and presented at the annual conference.

1. A representative from the student's institution will be asked to attend.
2. The recipient will be expected to attend and receive their award in person.
 - a. Travel Expenses for the recipient will be assumed by MASFAP.
 - b. Travel expenses will include mileage (per the Association's reimbursement policy), costs of the conference meal for the recipient and one guest, and hotel accommodations for one evening.
 - c. The Awards Chair (or designee) will collaborate with the Site Chair for the meal reservations and hotel accommodations.
 - d. The Awards Chair (or designee) will assist the recipient with completion of the Association's Reimbursement Request form in order to initiate reimbursement for mileage expenses, and submit to the Budget and Finance Committee for processing.

4.2.4 Lifetime Membership Awards

Recommended by the Awards Committee and approved by the board. The Awards Committee will solicit nominees from the general membership and develop a slate of candidates. The slate of candidates will be voted on by the board. The vote may be by ballot, including electronic ballots.

4.2.5 Presidents Award

Selected by the President. Selection is based on service to the association. Recipients can be individuals not associated with financial aid but who have contributed to the association and its purposes. This award is presented at the fall conference.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

4.2.6 Committee of the Year Award

Selected by the President. Selection is based on the past year's accomplishments, activities, etc. This award is presented at the fall conference.

4.2.7 Service Awards

In lieu of Service Awards gifts, the sum of \$1.00 per year of service per person at each five (5) year interval will be placed into the MASFAP Scholarship Fund.

4.3 POLICY: MEMBERSHIP DIRECTORY

- A. The Membership Committee is responsible for compiling the information for the Membership Directory.
- B. The computer input servicer will format the directory for publication.
- C. The Membership Committee is responsible for reviewing, updating, and revising the membership directory on the Association's web site.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

4.4 POLICY: MASFAP SCHOLARSHIP

PURPOSE: The Association will provide at least one scholarship per year to a student or students of a member institution. The number of awards and amount of each award will be determined annually, and will be based on the resources listed below:

1. **FUNDS:** Funds will be collected from the following sources:

- a. The interest from the Build America Bonds will be retained and used to fund the scholarship program.
- b. Individual donations.
- c. Institutional donations.
- d. Service Awards (see Policy 4.2.7)
- e. Fundraising: An annual fundraising event may be held at each conference, at the discretion of the President and Vice President.

2. **SCHOLARSHIP RECIPIENT SELECTION:** The selection of recipients will be based on the following criteria:

- a. The Budget and Finance Committee will recommend the number and amount of the scholarship(s) awarded each year.
- b. The recipient(s) may be chosen by drawing from the names of institutional members of the Association, which are registered for attendance at an annual meeting.
 - i. The President and Executive Board may choose to award these using a different process if an unusual or deserving situation should arise.
 - ii. An institution may not be selected two consecutive years.

3. **Fund Management**

- a. The Past Treasurer will transfer funds from the general operating account into the scholarship account after receiving the Service Awards form from the Awards Chair. See Policy 4.2.7 for additional guidance.
- b. The Past-Treasurer will collaborate with the Budget and Finance Committee to ensure the funds from the Build America Bonds are received and deposited annually.
- c. The Treasurer will prepare checks and cover letters for each institution selected from the drawing.
- d. The scholarship may be awarded at the discretion of the institution.

4.5 POLICY: WEBSITE

Information We Collect: MASFAP may collect personally identifiable information such as full name, phone number, mailing address and email address as part of a member's profile. If a purchase (membership, event registration, or other purchase), involves a credit card transaction, that payment will take place through a third-party payment processor which will collect payment information. No specific credit card information is collected or retained on the MASFAP website. We do not send promotional emails, but a member may receive service related emails regarding their account of information specific to the Association. A member may opt of receiving emails by contacting the Association's support email address or by updating their member profile.

How We Use Information: MASFAP uses the collected information to operate and maintain the organization membership functionality. A member's IP address is used only to help diagnose problems with our server, and to administer our website.

How We Share Information: Personally Identifiable Information: MASFAP will not rent or sell a member's personally identifiable information to others. Information may be stored on servers collocated with hosting providers. Any personally identifiable information a member elects to make publicly available, such as posting comments on a blog page or newsletter article, will be available to others. If a member requests to remove information another member has made public, copies may remain viewable in cached and archived pages on the site, or in locations where other users may have copied or saved that information.

Non-Personally Identifiable Information: MASFAP may share non-personally identifiable information (such as anonymous usage data, referring/exit pages, number of clicks, etc.) with potential advertisers, to help them understand the usage patterns for the website.

Storage and Processing: Information collected by MASFAP is stored and handled in the United States.

How We Protect Member Information: MASFAP is concerned with protecting our members' privacy and data, but cannot ensure or warrant the security of any information transmitted on the website, or guarantee the information may not be accessed, disclosed, altered or destroyed by breach of any industry standard physical, technical or managerial safeguards. When entering information, such as log in credentials, on our registration forms, the data is encrypted using secure socket layer technology (SSL). No method of transmission over the Internet or method of electronic storage is 100% secure, however. There is no guarantee of absolute security.

4.6 POLICY: LISTSERV

The MASFAP Listserv discussion group was established as a communication tool to allow for the timely exchange of information and problem resolution by MASFAP members. MASFAP membership is by institution; it may not be used to posts messages on behalf of a non-MASFAP institution.

Topics of discussion might include: automation within the professional community, the use of professional judgment, interpretation and impact of federal regulations, and institutional policies and procedures. The posting of aid-related position vacancies is also permitted. Most topics associated with professional administration are appropriate items for discussion.

Certain discussion items are NOT appropriate for this discussion list. These include non-administrative related discussions and inappropriate private business matters. All marketing and advertising for individual businesses is prohibited. However, information about scholarship opportunities sponsored by an Associate Member, which are free of obligation, will be allowed.

Questions regarding the use of this listserv should be directed to the Technology Chair with any further review to the Executive Board. Penalty for misuse of this service is at the discretion of the Technology Chair and the Executive Board.

Security features in place to prevent the spread of viruses and spam.

All messages will be posted through the ListLock Submission interface, requiring a member's Username, Password and current membership.

Only text messages will be distributed to the list, eliminating the problem of many institution's servers rejecting messages with attachments. Attachments must be formatted as a .doc, .pdf, .rtf, .jpg, .xls, or .txt file. A link to the file will be included in the email message to the Listserv. The uploaded file will be available for 10 days. The can be saved on a person's computer by using their browser's "save as" option.

Only messages posted through ListLock will be distributed to the listserv. For security, emails sent directly to the list or replies to the list will be automatically discarded.

Please Note: The time until the message actually posts to the list is dependent on the number of messages in the queue on the server. At peak times there may be delays.

Members should contact support@masfap.org for assistance.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

5. FINANCIAL POLICIES

5.1 ACCOUNTS PAYABLE

Bills to the Association are paid as received; there are no accounts payable per se.

5.2 CONFERENCE SPONSORS AND VENDORS

The Association will solicit sponsorship from various lenders, agencies, scholarship foundations, etc. However, it is the policy of the Association to not promote any individual agency or institution. Other organizations may not promote MASFAP without Association approval.

5.3 INTERNAL CONTROLS

The Budget and Finance Committee will:

1. Oversee current year budget and expenses; and,
2. Establish an annual operating budget for the Association and the committees, in collaboration with the President-Elect by the final meeting of the year.

All third party billings and reimbursement expenses incurred by the Association require the signature of the appropriate committee chair or Association officer before being paid by the Treasurer. If a reimbursement request is submitted for \$750.00 or more, it will require approval from the Budget and Finance Committee before payment will be issued. The Treasurer retains copies of all bills and expense claims. The Treasurer's records are available for inspection at any time by any officer or member of the Association.

5.4 RECONCILIATIONS AND INTERNAL AUDIT

Quarterly reconciliations of all accounts must be performed by the Past-Treasurer/Budget and Finance Chair. Reconciliation must be maintained in *Quickbooks*. The reconciliation reports obtained from *Quickbooks* must be submitted to the Budget and Finance Committee no later than 15 days from the end of the quarter: April 16; July 16; September 15; and January 15. The President must approve these reconciliations. The Past-Treasurer/Budget and Finance Chair will keep all bank statements and reconciliation documents on file for audit purposes.

On an annual basis, the delegates -at-large will conduct an internal audit of the Association's financial records. The Budget and Finance Committee will provide a list of all financial transaction to the delegates-at-large not later than 15 days from the end of the calendar year. The delegates-at-large will identify a representative sample of these records to review and special attention will be given to ensure transactions exceeding \$500 are selected for this review, in addition other transactions of a lesser amount. The Budget and Finance Committee will provide requested documents to the delegates-at-large for their review. The delegates-at-large should

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

provide the results of their review to the Budget and Finance Committee and the Executive Board during their respective meetings typically held in March.

Corporate Support: The Treasurer-Elect and the Corporate Support Chair will review and reconcile corporate support. The Treasurer- Elect will keep these records on file for audit purposes.

5.5 INVESTMENT POLICY

It is the policy of the Association to have an interest bearing checking account and to invest excess reserve funds in a manner recommended by the Budget and Finance Committee and approved by the Executive Board. This investment decision and nature should be generally conservative. No high yield or high risk funds will be explored.

5.6 OFFICER TRAVEL

Officers of the Association are reimbursed for hotel, meals, and travel expenses incurred in attending all Executive Board meetings. Reimbursement for meetings held in conjunction with an Association conference(s) where the board members institution will otherwise pay travel expenses is prohibited. A board member may not be reimbursement from the Association for conference travel expenses if the member institution declines reimbursement. Lodging expenses (pre- or post-meeting) may be reimbursed for officers who incur a 12-hour work day or more including travel during the day of Executive Board meetings.

The President-Elect, as the Association's representative to MASFAA, receives full reimbursement of registration, lodging, and travel expenses to attend the annual MASFAA conference.

Lodging for the President is provided at the state conference(s).

The Association's President-Elect and Treasurer-Elect receive full reimbursement for registration, lodging, and travel expenses related to attending the annual NASFAA Leadership Conference.

5.7 REIMBURSEMENT OF EXPENSES

Officers and members of the Association are reimbursed for hotel, meals, and travel expenses incurred for Executive Board and committee meetings upon submitting a Travel Expense Form to the Treasurer after it is signed by the appropriate committee chair or an officer.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

Automobile mileage is reimbursed at the current rate established by the State of Missouri. Hotel and airfare/train fare reimbursements require receipts. Meals should be held to a reasonable cost.

If a reimbursement request is submitted for \$750.00 or more, it will require approval from the Budget and Finance Committee before payment will be issued.

All reimbursement requests must be submitted to Budget and Finance within 30 days. No travel reimbursements are paid to Association members for MASFAP conference attendance.

5.8 RESERVE FUND

A reserve fund of the previous year's operating expenses less conference expenses should be established by the current Treasurer.

5.9 REVENUE AND EXPENSES

Revenues received and expenses incurred by the Association are itemized individually in the Treasurer's ledger(s), which are maintained online with *Quickbooks*.

The Budget and Finance Committee summarizes all fiscal activity, providing annual budget and balance information to the Association at each conference and Executive Board meeting.

All donations, from any donor, must be submitted on a Corporate Support Form and managed through the Corporate Support and Budget and Finance Committees.

Funds collected, other than exhibit fees and advertising will be allocated directly to the General Fund; however, reconciled as a Corporate Support line item in the budget; either Exhibit Fees, Advertising, and/or Donations.

5.10 STALE CHECKS

Any checks written by the Treasurer and not cashed within 90 days of issue, the Past-Treasurer will contact the payee and inform them that any checks not cashed within the next 90 days will be automatically credited back to the Association. The reissue of stale checks is handled on a case-by-case basis at the discretion of the Budget and Finance Committee.

The Past-Treasurer will monitor stale checks during the reconciliation process.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

5.11 VENDOR, SPONSOR, EXHIBITOR CANCELLATION AND REFUND POLICY

The Association will only make refunds within 30 days of the conference to vendors, sponsors, and exhibitors if a written request and an approved reason is received by the Treasurer.

Approved reasons for refunds are weather conditions, death, illness, or others specially approved by the Executive Board.

5.12 INSURANCE

The Missouri Association of Student Financial Aid Personnel shall be responsible for the purchase of three basic types of insurance in order to safeguard the Association and its members.

1. Director and Officer Liability
2. General Corporation Liability
3. Crime (includes Bonding)

The original copies of all policies are retained with Association Governance and Legal Issues chairperson.

5.13 GENERAL REFUNDS

MASFAP Reserves the right to refuse to refund event or membership fees collected so long as refund deadlines are outlined at the time of registration.

5.14 AUDITS

1. A financial audit will be conducted every three years by an independent professional auditor.
2. The Budget and Finance Committee will be responsible for securing an auditor
3. Audit results reported to the Executive Board.

Historical Note: The Board voted to begin this process in 2014.

5.15 NON-PROFIT STATUS

State of Missouri

1. The Association received its Articles of Incorporation of a General Not For Profit Corporation March 14, 1989.
2. To maintain this status, an Annual Registration Report must be filed with the Missouri Secretary of State each year by August 31.
3. The cost of filing the report is \$10.00.
4. The Report must be filed by a member of the board.
 - a. The past-president shall be responsible for this.
5. The Association must appoint a Registered Agent
 - a. The Registered Agent is to serve as the Association's contact in the event issues arise, and to inform the Board of those issues.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

- b. The Executive Board appointed Janice Barnes as the Registered Agent. (2016)
 - c. Contact information: Janice Barnes, c/o Saint Louis University, janice.barnes@slu.edu
 - d. The Past-President will provide a copy of filing report to the President and the Technology Chair to house with the Official Documents section of the Association's website.
6. A copy of the Missouri Sales and Use Tax on Purchases and Sales is located on the masfap.org website, under the Official Documents.
 - a. All members of the Board have access to this document
 7. All members should be informed of the tax-exempt status and are expected to utilize the form when making purchases for association business.

Federal IRS

1. The Association was granted tax-exempt status by the IRS August 20, 1990, under Taxpayer Identification Number 43-1161280.
2. To maintain this status, an IRS 990 form must be filed each year, and this responsibility is designated to the Association's Treasurer.

5.16 TREASURER-ELECT/TREASURER/PAST TREASURER GENERAL OPERATING PROCEDURES

1. Checking Account
 - a. Review with the Budget and Finance Committee banking services to ensure the best banking opportunities for MASFAP; considering location, cost and service(s). MASFAP is currently utilizing Commerce Bank for banking services starting in 2017. MASFAP is also utilizing U.S. Bancorp for our investment account with an expiration dates beginning in 2019 and final expiration date in 2030.
 - b. Update signatories each year, or as necessary, when officers change. The following officers should be included as signatories: Treasurer, Past-Treasurer and Treasurer-Elect.
 - c. Coordinate with the bank to ensure sufficient checks and deposit slips are available to conduct business.
 - d. Provide bank with a copy of MASFAP's most current federal tax-exempt status letter.
 - e. Order MASFAP debit card for new Treasurer or Treasurer-Elect each year, or as necessary.
 - f. The Treasurer will collect and destroy the bank-issued debit card from past treasurer, each year, or as necessary.
2. Membership Forms and Dues
 - a. After the institutional membership application is submitted online at masfap.org, payments should be sent directly to the Treasurer-Elect to MASFAP's official address. Stamp all checks immediately upon receipt and maintain them in a secure place until deposit is made.
 - b. Attach any check stubs, payment vouchers, phone messages, etc. to the invoice, if it accompanies the payment; don't throw away anything. If necessary, make

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

photocopies of checks to document the name of a school or an individual or an address (some checks will arrive without an invoice).

- c. Notify members who submit an incorrect payment right away using a copy of their invoice showing notations of balance due, refund, etc.
3. Manage membership payment records online at masfap.org. As soon as possible after payments are received, identify invoices as paid in the Administrative Payment Options, Payments Due section.
4. Conference Registrations
 - a. After the conference registration is submitted online at masfap.org, payments should be sent directly to the Treasurer-Elect to MASFAP's official address.
 - b. Each year, work with the Technology Chair to ensure the correct fees and mailing address is printed on the auto-generated invoice is accurate.
 - c. Follow the same procedures in handling registration payments as for membership dues. Many individuals will pre-register for a conference but choose to pay on-site. Print a list of unpaid conference registrations to the conference so payments may be collected at the time of registration.
 - d. At the Conference, plan to be at the Registration Table as much as possible to answer questions and keep things organized.
 - i. Provide list of paid/unpaid registrants, receipt book and write receipts for all cash transactions.
5. Treasurer's Report
 - a. Reports need to be prepared for distribution to the membership at annual meeting.
 - b. Prepare enough copies to be provided to membership.
 - c. Mid-fiscal year (June 1) and fiscal year-end (December 31) status reports should be produced and shared with Executive Board members.
 - d. Follow a standard format, which incorporates the Association's budget into the accounting of income and expenses. Itemize specific items on the report as necessary for clarity.
 - e. The Treasurer's report is maintained in digital format.
6. Journals: Separate journals of income and expenditures must be maintained on a current basis with gross totals. The Association uses Quickbooks to maintain these records.
 - a. The income journal should itemize every individual check or cash payment received, even if a refund is to be issued, according to the date of deposit. Subtotals for each net deposit will make balancing monthly bank statements easier. Making deposits on a weekly basis will minimize any transaction fees charged by the bank.
 - b. The expense journal needs to include check references; supporting documentation

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

for all debits should be maintained in a separate file. An Expense Claim Form needs to be received for all reimbursements but may be used to document other expenses. Expense Claims require the signature of the appropriate committee chair or an Executive Board member in addition to the Treasurer's authorization.

7. Tax Return (IRS 990EZ)
 - a. MASFAP is a tax-exempt organization: our ID# is 43-1161280.
 - b. Contact an accounting firm to prepare tax returns and do audits.
 - c. Work with Technology Chair to post the completed Return to the Association's official documents section of the website.
8. The Treasurer for the tax year in question is the keeper of the books for that year.
9. *30-60 days prior to Association conference, event approval must be obtained through ASCAP if any music will be provided. This includes live music as well as any mechanical music. Contact ASCAP, describe the event, and the proper licensing would be sent at that time.*
 - a. *Annual statements will be mailed/e-mailed from ASCAP. If there are no events to report, write across the form NO EVENTS and return to ASCAP for them to update their records. If there are events, complete the form and return with the proper payment.*
10. All payments and invoices should be mailed payable to:

MASFAP
2208 Missouri Blvd, Suite 102, #308
Jefferson City, MO 65109

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

6. GENERAL ISSUES OF CONDUCT POLICIES

6.1 ELECTION CAMPAIGN POLICY

No campaigning is allowed for elections of the Association.

6.2 ALCOHOL POLICY

The Association will not pay for alcoholic beverages and must be excluded from bills of Executive Board and Association committee meals. Members are expected to pay for their own alcoholic beverages.

Exceptions to this policy must be approved by the President and two-thirds majority of Executive Board members. Examples of instances where the Association may pay for alcoholic beverages may include special receptions and other approved events.

6.3 CONTRACT SIGNING

With approval of the board, the signing of contracts pertaining to site arrangements is the responsibility of the Site Committee Chairperson.

The signing of contracts pertaining to legal issues is the responsibility of the Association Governance and Legal Issues Committee Chairperson.

All other signing of contracts is deferred to the President, unless otherwise noted.

6.4 CODE OF CONDUCT

No action shall be taken by a MASFAP member during their performance of their professional duties that is for their personal benefit or could be perceived to be a conflict of interest. No amount of cash gift or other benefit (including food) in excess of a de minimis amount, and no amount of alcohol, shall be accepted by a MASFAP member, from any entity doing business with, or seeking to do business with, the Association.

Board members will disclose to the board any involvement, interest in, or potential conflict of interest with any entity with which the Association has a business relationship.

6.4.1 Statement of Ethical Principals and Code of Conduct

The primary goal of the financial aid professional is to help students achieve their educational goals through financial support and resources. MASFAP members are required to exemplify the highest level of ethical behavior and demonstrate the highest level of professionalism. All members of the Association shall uphold the Statement of Ethical Principals and Code of Conduct, as adopted by NASFAA.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

A direct link to the full text of NASFAA's Statement of Ethical Principles and Code of Conduct can be found here: https://www.nasfaa.org/Statement_of_Ethical_Principles

6.4.2 Resolution of Policy Violations

MASFAP operates under the assumption that all members are trying to comply with the Statement of Ethical Principles and Code of Conduct (Code), and it views promulgation and interpretation of the Code as, first and foremost, educational. But when necessary and in appropriate circumstances, the Resolution of Policy Violation procedures are designed to provide appropriate notice, an opportunity to respond and be heard, and objective decision-making, for all Association members who may be the subject of a complaint, regardless of whether they have legal counsel. Sanctions are imposed as a last resort based on willful noncompliance or severe breaches of the Code.

Members are encouraged to contact one of the four Delegates-At-Large, if they have any questions regarding the Statement of Ethical Principles, the Code of Conduct, or these procedures.

6.4.3 How to Report / Lodging a Complaint

Any entity or individual may lodge a complaint concerning possible violation of the Code, regardless of whether the entity or individual is a member of the Association. A complaint must be in writing and submitted to one of the four elected Delegate-At-Large officers of the Association (or in some cases, the Site Committee Chairperson or designee). At a minimum, the complaint must include the name, employer, position, address, e-mail address, telephone number, and signature (digital or written) of the author of the complaint (the "Complainant"), a specific reference to the Code sections alleged to have been violated, and a description of the alleged violation itself based on facts that have occurred. If these elements are not present, the complaint may be dismissed.

By submitting a complaint, the Complainant agrees that they will cooperate in the Code enforcement process and, upon request, will give personal testimony in the presence of the member against whom the complaint is lodged (the "Respondent"); failure of the Complainant to cooperate in the investigation or hearing may be considered by Association Governance and Legal Issues Committee as grounds to dismiss the complaint.

6.4.4 Complaint Evaluation

Upon receipt of the complaint, the Delegate or Site Committee Chair will forward the complaint to the Association's President and Association Governance and Legal Issues (AGLI) Committee Chair, who will then determine as soon as feasible whether the complaint: 1) alleges a violation of the Code; 2) contains sufficient and reliable information; and, 3) fall under the Association's jurisdiction in that the institution in question was a MASFAP member at the time the alleged infraction took place.

The AGLI Chairperson may request additional information and consult with members of the AGLI Committee, conduct independent research, and take other actions consistent with the obligation to determine if a complaint meets these basic criteria.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

Within 30 days, the AGLI committee will determine if the complaint meets the basic criteria, a full investigation will begin; however, if the complaint does not satisfy the basic criteria, the complaint will be rejected and notification will be sent to the Complainant.

If the committee determines an investigation is necessary, the Committee will:

- Notify the Complainant that the complaint has been received and indicate the status of the complaint.
- Share the complaint with the Respondent and obtain the Respondent's reaction to the allegations.
- Determine whether the individual MASFAP member or the member's institution, or both, should be considered the Respondent.
- Committee reserves the right to maintain anonymity of the Complainant

If the Committee determines that a complaint does not warrant an investigation, the matter will be closed and notice of the decision will be promptly communicated to the Respondent and the Complainant.

If the Respondent does not respond to the Committee, the Committee may proceed directly to disciplinary action.

The AGLI Committee will examine all relevant matters, including the Complaint, any oral or written response submitted by the Respondent, and information from any other credible sources available to MASFAP.

If any member of the AGLI Committee has or has had business, financial, personal, or family relationship with any party to the matter, that member must disclose this relationship to the Committee and recuse themselves based on potential conflict of interest.

6.4.5 Hearing and Appeal

If the Association Governance and Legal Issues (AGLI) Committee determines that a hearing is necessary after reviewing the complaint and conducting a preliminary investigation, the Committee will inform all parties of the decision, and provide the time and place of the hearing. Additionally, the Committee will provide a copy of the complaint and the record of the investigation to date.

Each party will have the opportunity to waive the hearing. If the respondent chooses to not contest a finding of violation of the Code of Ethics, they may address the Committee directly regarding the appropriate sanction.

The AGLI Committee will establish the agenda and procedures for the hearing. The Chair of the AGLI committee will preside and members of the committee will serve on the panel. The hearing will be informal, and a transcript of the hearing will be maintained but will not be made public. All parties will be offered the opportunity to be heard, either in person or through counsel; the hearing panel may call other witnesses in its discretion; and, the hearing panel may set time limits; all parties, including the panel may admit documents into the record of the hearing; the complainant and the respondent may each pose questions of the other or the other's representatives at the

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

6.4.6 Sanctions

The following sanctions may be imposed upon a MASFAP member Respondent who is found to have violated the Code of Conduct.

1. **Statement of Concern:** a formal written statement by MASFAP addressed to the Respondent; there is not publication of the statement of concern. A statement of concern is appropriate where a complaint has not been closed earlier with no investigation, where MASFAP has found a likely violation of the Code of Conduct, but where the violation was relatively minor and likely not recurring and/or the AGLI Committee has received acceptable assurances that suitable corrective action has been taken or is being taken.
2. **Reprimand:** a formal written rebuke by MASFAP addressed to the Respondent; there is no publication of a reprimand. The recommendation of a reprimand may include a recommendation for training pertinent to the violation.
3. **Temporary Suspension:** temporary suspension will exclude a MASFAP member Respondent from MASFAP membership for a stated period and may include a prohibition, including from attendance or participation in any activity at any level within MASFAP. Upon expiration of the suspension, the member shall be eligible to reapply for membership.
4. **Permanent Suspension:** permanent suspension will exclude a member Respondent from MASFAP membership and includes prohibition from attendance or participation in any activity at any level within MASFAP. Those who are permanently suspended may reapply for membership after five years with appropriate documentation of improvement. The AGLI Committee would rule on the application at the time of reapplication.

6.4.7 Additional notes

All records of the complaint, investigation, hearing, and appeal will be maintained by MAFSAP files for a least five years in the MASFAP Archives.

All parties shall bear their own costs and expenses with respect to any aspect of the proceedings, unless otherwise determined by the AGLI Committee.

MASFAP reserves the right to inform the primary contact from the institution where the Complainants and/or the Respondents is/are employed.

MASFAP will comply with other federal laws as needed, such as, but not limited to: Title IX of the Education, the Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act, and the Violence Against Women Reauthorization Act of 2013.

Reference to this policy will be displayed for members to acknowledge when registering for Association events.

6.5 REMOVING A BOARD MEMBER

PURPOSE: Occasionally, a board member needs to be removed from the board. In some cases, a conflict of interest or unethical behavior may be grounds to remove an individual from the board. In other cases, the behavior of a board member may become so obstructive that the board is prevented from functioning effectively.

Strongly felt disagreements and passionate arguments are often elements of the most effective boards (and genuine debate). Please note that arguing for an unpopular viewpoint is not grounds for board dismissal. However, if a board member consistently disrupts meetings or prevents the Association from working well, removal may be appropriate.

Although board member removal is rare, MASFAP does have provisions for this situation built into the bylaws. The following strategies can be used to remove troublesome board members:

- **Personal Intervention**

One-to-one intervention by the president or other board leadership is a less formal solution to managing problem board members. If a board member has failed to attend two meetings in a row, or has become an impediment to the board's work, board members can meet informally with the board member in question. MASFAP bylaws outline the specific cases a board member can be removed and why. In person, telephone, or date/time-stamped email, the president can request a resignation.

- **Leave of Absence**

Individuals may take a leave of absence from the board if they have health, work, or other reasons why they cannot participate fully during the current term. The president may also suggest a leave of absence to a board member who is, for example, failing to do tasks he or she agreed to do, and will offer a gracious exit. A successor will be appointed by the president in accordance with guidelines provided in the MASFAP Constitution and Governing by-laws.

- **Impeachment**

If it is decided that a board member has become derelict in their duties as described in the MASFAP Constitution and Governing By-laws, the member may be subject to impeachment. The board member can be removed by a roll-call vote, where if two-thirds of present voting members find for impeachment, the board member shall be removed from the board and a successor will be appointed by the president in accordance with guidelines provided in the MASFAP Constitution and Governing By-Laws.

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

7. STATEMENT ON THE ROLE OF MASFAP

The role of the Missouri Association of Student Financial Aid Personnel shall be:

- (1) to establish and maintain high professional standards in the administration of college, university, and other post-secondary financial aid programs;
- (2) to establish and maintain effective relationships between high schools, colleges, and financial aid agencies, and organizations concerned with or engaged in the support and/or administration of student financial aid, both public and private;
- (3) to develop effective outreach programs designed to encourage qualified students to pursue higher education;
- (4) to coordinate activities with other professional organizations with like objectives;
- (5) to maintain ongoing contacts with state and national assemblies, in order that new ideas, projects and problems concerning present and proposed legislation can be voiced;
- (6) to maintain contact with federal and state officials in agencies relating to student financial aid;
- (7) to initiate and to maintain a program of public information concerning student financial aid, and to assist those agencies dedicated to this task;
- (8) to provide a program to exchange information and ideas among the members of the Association;
- (9) to provide training materials and programs, which will stimulate and further professional growth, enable financial aid personnel to improve service to students.

8.0 MISCELLANEOUS INFORMATION

8.1 Association Contact Information

8.1.1 Mailing Address

MASFAP
2208 Missouri Blvd, Suite 102, #308
Jefferson City, MO 65109

8.1.2 Email Address groups

masfap@masfap.org (President, President-Elect, Past-President, Secretary)
finance@masfap.org (Treasurer, Treasurer-Elect, Past-Treasurer, President,

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL
President-Elect, Corporate Support Chair
leadership@masfap.org (President, Past-President, LDP participants)
earlyawareness@masfap.org (Early Awareness Committee members)

8.2 Investment Account and Contact Information

8.2.1 Build America Bonds

8.2.2 General Banking

8.3 Association Insurance

- The Immediate Past President is responsible for renewing the Association's insurance policies each year.
- MASFAP has three different insurance policies and uses CBIZ Insurance Services to assist with coordination of these insurance policies.
- The policies periods run April to April, therefore renewal must be completed by the end of March. The renewal process should begin in January/February to allow ample time for the Association's review of the policies, and the insurance holder's approval of each policy.

The point of contact at CBIZ is:

Pamela M. Wallace, CISR
pwallace@CBIZ.com
700 West 47th Street, Suite 1100
Kansas City, MO 64112
888-408-7500 or 301-310-9650

8.3.1 Business Owners through The Hartford (which is a liability policy in the event someone gets hurt at an event, or in any situation in which MASFAP is liable (does not cover theft)

8.3.2 Crimesheild through The Harford (which is a policy that covers employee/volunteer theft)

8.3.3 Director and Officers policy through Travelers (which covers wrongful acts made from decisions made by the Board that caused financial loss).

8.4 Official Documents

8.4.1 Location

Website: <https://www.masfap.org/ChairAccess/OfficialDocuments/OfficialDocs.html>

8.4.2 How to access

Member Service > Administrative Services > Executive Board/Committee Chair Administration > Chair Actions > Executive Board > Official Documents

MISSOURI ASSOCIATION OF STUDENT FINANCIAL AID PERSONNEL

9.0. FORMS

The following forms may be found on the MASFAP website :

<https://masfap.memberclicks.net/forms>

- 9.1 Event/Activity Expense Reimbursement
- 9.2 Travel Expense Reimbursement Form
- 9.3 Debit Card Use Form
- 9.4 Service Awards Calculation Form
- 9.5 Budget Request Form
- 9.6 MASFAP Brochure (2017)
- 9.7 MASFAP W-9 Form
- 9.8 Bob Berger Newcomer Award Nomination Form
- 9.9 Student Success Story Nomination Form
- 9.10 Membership Application
- 9.11 Committee Volunteer Form
- 9.12 Treasurer's Report
- 9.13 Statement of Candidacy
- 9.14 Tax Exempt Form

10. ADDENDUMS

10.1 See the Strategic Plan for the Association's blueprint.

<https://masfap.memberclicks.net/assets/docs/2017MASFAPStrategicPlan.pdf> (2017)