



New Jersey Association of Student  
Financial Aid Administrators, Inc.

# **Policies and Procedures Manual**

**10/3/2021**

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## **1.0 INTRODUCTION TO NJASFAA POLICY AND PROCEDURES MANUAL**

### ***1.1 Purpose***

The NJASFAA Policy and Procedures Manual is designed to provide guidance, reference material, and historical continuity for the NJASFAA Executive Council, Committee Chairs, and membership. This document is stored in as a Word document to ensure easy updating and duplication.

Each member of the NJASFAA Executive Council and all Committee Chairs are responsible for knowing the content of the NJASFAA Policy and Procedures Manual. The manual is reviewed annually at the Board of Directors Planning Retreat in the Spring (at which time updates are considered) and is distributed to new Executive Council members and Committee Chairs at the annual retreat.

### ***1.2 Content***

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

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

### ***1.3 Use***

It is the responsibility of each Executive Council member and Committee Chair to:

- keep the P&PM current by providing appropriate updates (procedural changes, new forms, etc.)

### ***1.4 Storage***

The NJASFAA Policies and Procedures Manual is currently stored on the PPM coordinator's computer.

## 2.0 NJASFAA Mission Statement

**The New Jersey Association of Student Financial Aid Administrators** is a non-profit organization dedicated to promoting the effective administration of student financial aid in New Jersey. This is accomplished through the education and training of financial aid administrators and by assisting students and families obtain access to higher education.

The Association is committed to providing professional development activities that:

- embrace the ethical principles and practices of financial aid administration through education and training,
- promote the affordability of higher education
- provide timely and accurate information to the community and public at large,
- advocate at the state, regional and national levels, and
- encourage alliances with other organizations having similar objectives.

2/13/06

### 3.0 NJASFAA MEMBERSHIP and SERVICES

#### **Purpose:**

NJASFAA is a non-profit organization of individuals interested in promoting the effective administration of student financial aid in New Jersey. From the Association's inception, we have sought to ensure access to post-secondary education for the many students wishing to attend New Jersey institutions through a variety of professional efforts.

As stated in Article III of the Constitution and Bylaws, the purpose of the association is to:

1. "...promote, establish, maintain, and operate educational programs;
2. educate and train administrators and counselors of student financial aid programs on issues dealing with the obtaining of financial aid by students and/or by a student's family;
3. educate the community and public at large; and
4. work with and cooperate with other organizations having similar objectives and provisions as stated above..."

#### **Membership:**

There are three categories of membership within the Association:

- Active* – limited to student financial aid administrators in post-secondary educational institutions in New Jersey,
- Associate* – open to out-of-state student financial aid administrators, representatives of governmental agencies, secondary educational institutions, foundations, private and community organizations interested in student financial aid matters, and
- Retiree* - open to individuals who previously qualified for either active or associate membership in the Association who have retired from service to the profession.

#### **Privileges of Membership:**

*All members are eligible for the following benefits/services:*

1. Training programs offered by the Association
2. Access to the NJASFAA membership database
3. Participation on NJASFAA Committees

*Active members are also entitled to the following additional privileges:*

1. Voting on all matters before the general membership, including the yearly elections of officers
2. Entitled to run for and hold elected office in the Association

*Associate members are also entitled to the following additional privilege:*

1. Voting on all matters before the general membership, including the yearly elections of officers
2. Can hold one seat as Council Person at Large, based on the results of the annual election

**Denial of Membership:**

NJASFAA reserves the right to refuse membership to any individual who does not embrace and/or adhere to the basic tenets of the Association. Any denial will be determined by the Executive Council.

5.23.20

#### **4.0 NJASFAA Policy on Use of Name and Logo**

The name "New Jersey Association of Student Financial Aid Administrators," the initials "NJASFAA," and NJASFAA's distinctive logo are all service marks owned by NJASFAA. These service marks may not be used by anyone (including NJASFAA members) in any manner without written permission from NJASFAA, other than in the limited exceptions detailed below. Moreover, NJASFAA does not allow its members to indicate their affiliation with NJASFAA on any commercial solicitations. The intent of these policies is to avoid giving the impression that NJASFAA is a credentialing organization or endorses a product, service, person, or entity.

Following are the limited exceptions under which a NJASFAA member may use the name "New Jersey Association of Student Financial Aid Administrators" or the initials "NJASFAA" (but not its logo) without prior permission.

- \* In reference to any NJASFAA conference, workshop, publication, video, or web site.
- \* In reference to news or information disseminated by NJASFAA (e.g., "NJASFAA reported. . .")
- \* In Annual Reports, internal documents, and similar noncommercial materials as might be required by the member institution's administrative practices.
- \* On resumes or similar biographical materials.

Please refer your questions on the above policy or requests for permission to use NJASFAA's name, initials, or logo, to the Chair of Constitution and By-Laws.

6/15/07

**5.0 ELECTED OFFICERS and COMMITTEE CHAIRS  
POSITION DESCRIPTIONS**

PRESIDENT  
PAST-PRESIDENT  
PRESIDENT-ELECT  
VICE PRESIDENT  
SECRETARY  
TREASURER  
TREASURER-ELECT  
COUNCIL PERSON AT LARGE  
COMMITTEE CHAIR



TITLE: PRESIDENT

### **Basic Function and Responsibility**

The President acts as the chief executive officer of the Association presiding at all meetings of the Association.

### **Characteristic Duties and Responsibilities**

Provides leadership and direction to all activities of the Association and all standing and ad hoc committees of the Association.

1. Serve as the official representative and spokesperson of the Association; delegates such responsibility to another council or board member as deemed necessary.
2. Call and preside at all meetings of the Association and the Executive Council, determines length of floor debate, manner of voting, and agenda items.
3. Ensure all committees function appropriately; and address problems as needed.
4. Serve as an ex-officio member of all Association committees.
5. Submit an Annual Report to the Association on all matters that have taken place during that term of office that may be of interest or concern to the Association members.
6. For the President who begins their term during an even year (e.g. 00-01, or 02-03) and continuing into the subsequent year, acts as the EASFAA representative (this is a two-year position). Can appoint a designee to perform these duties. It is recommended that the designee be the current Past-President or other current member of Council. In the event this position is filled by a designee, the individual is required to attend Council meetings.

### **Length of Office**

One year commencing June 1.

5/18/10

## TITLE: PAST PRESIDENT

### **Basic Function and Responsibility**

The Immediate Past President is an officer of the Association, shall serve as a member of the Executive Council and shall perform such duties as assigned by the President.

### **Characteristic Duties and Responsibilities**

1. Participate in the meetings and activities of the Executive Council and contributes to the formulation of policies and procedures of the Association.
2. Serve as Chair of the Board of Directors.
3. Responsible for the annual review and update of the NJASFAA Policy and Procedures Manual and Constitution and By-Laws.
4. Send out ballots to members for any Association action that requires a vote of the membership.
5. Chair of Nominations & Election Committee.
  - a) Solicits nominations for election slate.
  - b) Solicits nominations for the Distinguished Service awards. Conducts conference call to select recipients. [Because these awards represent the highest honor NJASFAA can bestow, standard practice dictates that only one recipient be selected for the Art Richmond and Tom Scott awards.]

*NOTE: at least two additional Past-Presidents need to be included in the discussion of the Distinguished Service Awards.*

6. Responsible for monitoring and reviewing the Long-Range Strategic Plan. Works with committee chairs to meet their goals. Provides report to the membership at year's end.
7. For the person who is Past President during an odd year (e.g. 99-00, or 01-02), will continue to serve as the EASFAA representative.

### Length of Office

One year commencing June 1.

5/22/13

## **TITLE: PRESIDENT ELECT**

### **Basic Function and Responsibility**

The President Elect is an officer of the Association and shall perform the duties of the President in the event of absence or incapacity of the President to serve; and shall perform such duties as are assigned by the President.

### **Characteristic Duties and Responsibilities**

1. Provide assistance to the President of the Association in any area as requested.
2. Attend the NASFAA Leadership conference.
3. Serve on the Board of Directors.
4. Responsible for timely (as soon as possible after elected) selection of site and program conference chairs for the coming year. Regular reports on the conference planning should be made at Executive Council meetings in absence of the Conference Chair.
5. Serve as Parliamentarian of the Association.
6. Member of the Nominations and Elections Committee.
7. Encouraged to attend at least one meeting of every committee in preparation for the presidency.

### **Length of Office**

The President Elect shall serve for one year commencing June 1. The President Elect automatically becomes President one year later.

5/18/10

**TITLE: VICE PRESIDENT**

**Basic Function and Responsibility**

The Vice President is an officer of the Association and shall perform the duties of the President in the event of absence or incapacity of both the President and the President-Elect, and shall perform such duties as are assigned by the President.

**Characteristic Duties and Responsibilities**

1. Chair of the Finance Committee.

May also include, but are not limited to:

2. Support the conference chairs previously appointed by the President Elect.
3. Facilitate or assist Executive Council Committee Chairs as needed.

**Length of Office**

One year commencing June 1

5/18/10

**TITLE: SECRETARY**

**Basic Function and Responsibility**

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

**Characteristic Duties and Responsibilities**

1. Develop and distributes NJASFAA meeting minutes to the NJASFAA Executive Council, Committee Chairs and other designated Association members within 2 weeks following any meeting of the Executive Council.
2. Responsible for putting monthly meeting minutes on the website when approved.
3. Responsible for putting the annual business meeting minutes (which occur at the Fall and Spring conferences) on the website when approved.
4. Responsible for ensuring a smooth transition from year to year by documenting computer procedures and training his/her successor.
5. Coordinate requests for stationary.
6. Develop and distribute the list of Executive Council members with addresses, telephone (work, cell and home) and FAX numbers.
7. E-mail notice of regular NJASFAA meetings (with agenda) at least 2 weeks in advance of the meeting.
8. Notify membership of any rescheduled meetings.
9. Keep the NJASFAA Calendar and updates this as needed.
10. Perform other functions as assigned by the President or prescribed by the Executive Council.

Length of Office

One year commencing June 1

5/18/10

## TITLE: **TREASURER**

### **Basic Function and Responsibility**

The Treasurer is an officer of the Association and shall be responsible for mentoring the Treasurer-Elect, including providing advice and training in the development, distribution, and maintenance of the financial records of the Association and performing transactions as directed by the Executive Council. The Treasurer shall be ready whenever required to provide assistance and guidance to the Treasurer-Elect.

This position provides for a period of transition during which the Treasurer-Elect will shadow and assist the Treasurer in the first half of the year, gradually shifting responsibility to the Treasurer-Elect. By January, the Treasurer-Elect will take full responsibility for all transactions (invoicing, payments, entering into QuickBooks, NJASFAA Website) and for providing the Budget vs. Actuals and Balance Sheet reports at Executive Council meetings.

The Treasurer has fiduciary responsibility to the Association.

### **Characteristic Duties and Responsibilities**

1. Receive and disburse monies of the Association in accordance with the authority provided by the Executive Council.
2. Responsible for invoicing and collection of all fees and past due fees including sending out invoice/payment reminders for any outstanding invoices on a monthly basis.
3. Maintain adequate and appropriate records of all transactions in QuickBooks and on NJASFAA website.
4. Reconcile funds on a monthly basis.
5. Responsible for posting monthly Budget vs. Actuals and Budget Sheet reports on website.
6. Responsible for ensuring a smooth transition from year to year by documenting and developing computer procedures and training his/her successor.
7. Responsible for the proper and timely filing of all reports including, but not limited to, all necessary tax returns, audits, etc. and maintaining adequate liability and property insurance. Responsible for providing documentation that taxes have been filed in a timely manner for the most recent fiscal year.
8. Attend all conferences and validate and collect conference fees as appropriate.
9. Renew the Music Copyright Licensing Agreements (see **Policies 8.9**).
10. Renew insurance policy on annual basis to ensure adequate coverage.
11. Member of the Finance Committee; assists and recommends financial policies regarding investments and reserves.

12. Member of the Board of Directors; assists with the formulation of the Associations' annual budget.
13. Performs other functions as assigned by the President.

**Transition responsibilities:**

Treasurer is responsible for training the Treasurer-Elect in all the functions of a Treasurer including but not limited to the following:

14. Responsible for training the Treasurer-Elect to receive and disburse monies of the Association in accordance with the authority provided by the Executive Council.
15. Responsible for training the Treasurer-Elect to invoice and collect all fees and past due fees.
16. Responsible for training the Treasurer-Elect to maintain adequate and appropriate records of all transactions in QuickBooks and on NJSAFAA website.
17. Responsible for training the Treasurer-Elect to reconcile funds on a monthly basis.
18. Responsible for training the Treasurer-Elect to develop and post monthly Budget vs. Actuals and Balance Sheet reports on website.

Length of Office - One year commencing June 1.

Calendar of Events – see Appendix B

4.27.19

## **TITLE: TREASURER-ELECT**

### **Basic Function and Responsibility**

The Treasurer-Elect is an officer of the Association and shall be responsible learning the policies and procedures and all tasks related to the position of Treasurer. This position provides for a period of transition to shadow and assist the Treasurer for the first half of the year, gradually taking on responsibilities of the position. By January, the Treasurer-Elect will take full responsibility for all basic transactions (invoicing, payments, entering into QuickBooks, NJASFAA website) and for providing the Budget vs. Actuals and Balance Sheet reports at Executive Council meetings.

The Treasurer-Elect shall be ready in the absence of the Treasurer to provide an accounting of funds and any financial records requested. The Treasurer-Elect has fiduciary responsibility to the Association.

### **Characteristic Duties and Responsibilities**

1. Receive and disburse monies of the Association in accordance with the authority provided by the Executive Council.
2. Responsible for invoicing and collection of all fees and past due fees, including sending out invoice/payment reminders for any outstanding invoices on a monthly basis.
3. Maintain adequate and appropriate records of all transactions in QuickBooks and on NJASFAA website.
4. Reconcile funds on a timely basis.
5. Responsible for posting monthly Budget vs. Actuals and Balance Sheet reports on website.
6. Work with the Treasurer to ensure smooth transition from year to year.
7. Assist the Treasurer in the proper and timely filing of all reports including, but not limited to, all necessary tax returns, charity reports, audits, etc. and maintaining adequate liability and property insurance.
8. Attend all conferences and validate and collect conference fees as appropriate.
9. Member of the Board of Directors; assists with the formulation of the Association's annual budget.
10. Member of the Finance Committee; assists and recommends financial policies regarding investments and reserves.
11. Perform other functions as assigned by the President and/or Treasurer.

Length of Office - One year commencing June 1.

Calendar of Events - see Appendix B

4.27.19



**TITLE: COUNCIL PERSON AT LARGE (4 positions)**

**Basic Function and Responsibility**

The Council Person at Large is an officer of the Association and is responsible for providing input at NJASFAA Executive Council meetings from the membership. The Council Person at Large is also assigned a chair a committee by the President.

**Characteristics Duties and Responsibilities**

1. Attend all NJASFAA Executive Council meetings.
2. Serve as a liaison in disseminating information to and gathering opinions from the membership.
3. Serve as Chair of a committee to be determined by the President.
4. Develop a quarterly update to the membership, to include updates from Council and NJASFAA activities.

NJASFAA proudly encourages any member of the Association to run for Council Person at Large. We also encourage newer members of the Association to join the Council by running for this position. Although there are no restrictions to the number of times any member can run for this position, we want to be mindful and allow newer members to be successful in their attempt to join the Council.

**Length of Office**

One year commencing June 1.

6/13/13

## **TITLE: COMMITTEE CHAIR**

### **Basic Function and Responsibility**

To provide leadership and serve as a facilitator for a committee which will formulate and recommend appropriate positions to NJASFAA Executive Council. Standing Committee chairs are expected to attend and participate in all Executive Council meetings.

### **Characteristic Duties and Responsibilities**

1. Responsible for developing goals and objectives for Executive Council approval.
2. Facilitate no less than four (4) meetings per year and for selecting site, taking attendance and minutes at each meeting. Meetings may be held via phone or video conferencing.
3. Responsible for selecting committee members.
4. Submit meeting minutes and/or report to the President and Secretary prior to each Executive Council meeting.
5. Responsible for monitoring attendance/participation/behavior at committee meetings (Recommend committee member dismissal to NJASFAA Executive Council as necessary.)
6. Submit final listing of committee members for recognition certificate.
7. Prepare activity reports for distribution at Fall and Spring Conferences.
8. Provide the President and Membership Chair with a listing (names, phone and fax numbers) of committee members.

### **Length of Office**

One year commencing June 1

Committee Chair may be an active or associate member of the organization.

10/5/08

## 6.0 COMMITTEES

### 6.1 *Committee Listing*

#### STANDING COMMITTEES

- \* Finance
- \* Membership
- \* Nominations and Elections

#### OTHER COMMITTEES (formed at the discretion of the President)

- \* Awards and Recognition Committee/Sunshine
- \* Board of Directors
- \* Conference Committee
- \* Constitution and By-Laws
- \* Development
- \* Diversity and Inclusion
- \* EASFSA Representative
- \* Government Relations
- \* Mentoring
- \* NJACSA
- \* NJFAFSA Days
- \* Non-Traditional Educational Concerns
- \* Novice Training/Mentoring (training provided every other year)
- \* Public Relations/Speakers Bureau
- \* Technology Committee
- \* Training and Professional Development

### 6.2 *Committee Membership Policy*

- A. Committee members must be active or associate members in good standing as defined in the By-Laws.
- B. Committee Chairs are selected by the incoming President.
- C. A member may serve on more than one committee but it is strongly recommended that as many members are invited to participate as possible. The goal of the Association is to involve the entire membership.
- D. All committee chairs should make every effort to recommend committee members who represent the membership (i.e. race, gender, institution type and sector).
- E. Committee Chairs shall inform committee members of their responsibilities.

The above policies are established to best serve NJASFSA and its committee structure. The President and/or Executive Council may make exceptions to these policies when such exceptions are in the best interest of NJASFSA.

### **6.3 Committee Reports**

- A. Committee Chairs will prepare an agenda for each committee meeting.
- B. Minutes will be taken at every committee meeting.
- C. Committee Chairs or designee will attend Executive Council meetings.
  - a. Committee Chairs will submit a written report regarding the committee's activities to the President prior to the Executive Council meeting.
  - b. Committee Chairs will post meeting minutes on the website
- D. Committee Chairs are responsible for submitting the Travel Reimbursement form (available on the web-site) to the Treasurer immediately after each expenditure.
- E. Each Committee Chair will be responsible for completing a Fall and Spring activities report. This will include a list of goals and accomplishments, committee members and suggestions or recommendations for future committees.

### **6.4 General Responsibilities**

Committee responsibilities are specifically outlined below. Committee Chairs are responsible for seeing that their committees perform as indicated.

- A. At the beginning of the year, a Committee Chair will develop the goals and objectives, a plan of action, and priorities for the coming year. This planning would include a calendar. These plans will be discussed at the annual Executive Council retreat. Since the Executive Council has final authority for the actions of the various committees, it is important that they review and approve the goals, objectives, and priorities for each committee.
- B. Committee Chairs are responsible for implementing the goals and objectives during their period of service.
- C. Committee Chairs are responsible for calling all meetings, making physical arrangements, notifying the President of all meetings, setting the meeting agendas, distributing the agenda to members and President prior to the meeting.
- D. Committee Chairs are responsible for distributing reimbursement forms to their committee members, signing and sending Travel Reimbursement Forms to the Treasurer.
- E. Committee Chairs are responsible for providing the members with guidelines as to their responsibilities and tasks for the year and monitoring the performance of the committee and committee members.
- F. Committee Chairs are accountable for their committee budget as approved by the Executive Council. As such, Chairs must monitor all expenses to be sure that they are legitimate expenses of the committee and within the committee's budget. A Reimbursement Claim form should be signed by the Committee Chair and submitted to the Treasurer for reimbursement of expenses by any committee member.
- G. Committee Chairs are responsible for submitting a list of committee members to the President and the Membership chair.
- H. NJASFAA committees should make every attempt to coordinate their activities with regional and national committees with similar goals and responsibilities.
- I. Committees and the Committee Chairs may have other duties as assigned by the President and/or Executive Council.

## ***6.5 Term of Office***

One year commencing June 1.

5/18/10

## **AWARDS/RECOGNITION/SUNSHINE COMMITTEE**

### **Purpose – Awards and Recognition:**

The purpose of the Awards Committee is to coordinate the ordering and delivery of all awards being given to recipients at NJASFAA functions, including longevity awards for milestone members.

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

1. Develop wording of awards (plaque, scroll, resolution, etc.)
2. Order award items. Chair is responsible for arranging for the printing or engraving of all awards and the gavel plaque.
3. Deliver awards to appropriate meeting, conference.
4. Chair works to ensure that all Award Recipients are invited and plan to attend the Spring Conference in order to be recognized by the Association and to receive their award.

*NOTE: See Appendix K for award details.*

### **Purpose - Sunshine:**

The purpose is to acknowledge the personal happenings of members of the Association.

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

1. Coordinate with the President the collection and dissemination of personal event information of members of the Association (e.g. promotion, birth of a child, death of a family member).
2. Acknowledge the birth of a child or death of a family member via a card or note or other appropriate remembrance sent on behalf of the Executive Council and the Association.
3. Notify the NJASFAA membership of each event via the web-site so individual members can make personal contact with the member or family. Members will be gently reminded that they may make a contribution to the scholarship fund on an individual's behalf

### *Further guidelines:*

*Sympathy notifications will be made for immediate family members (spouse, parent, child).  
Cards will be sent to recognize new a new job, baby, or a move.  
Retirements will be recognized with a certificate and retiree pin.*

## **Membership**

Participation is open to all NJASFAA members.

## **BOARD OF DIRECTORS**

### **Purpose:**

The Board of Directors can advise the President and the Executive Council regarding changes needed in the Constitution and By-Laws. This committee maintains the Policy and Procedures Manual. This committee also serves the Executive Council regarding long-range planning, operation, structure, and service to members.

### **Statement of Principle:**

In its role as an advisory committee, the Board can make recommendations to the Executive Council to enhance the organization. The Board embraces a philosophy of transparency and encourages the same for the Executive Council. The Executive Council has the ultimate authority in running the Association.

The standing Past President serves as chair of this committee.

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

1. Analyze and develop needed changes to the Constitution and By-Laws of the Association and ensure that proper procedures are followed in these document changes. Once proposed, the Constitution and By-Laws Committee takes the necessary action.
2. Review and recommend changes to the NJASFAA Policy and Procedures Manual.
3. Discuss alternatives and make long range recommendations regarding NJASFAA mission, operation, structure, and service to members.
4. The Board of Directors, with the approval of the Executive Council, is responsible for the establishment and naming of awards for NJASFAA.
5. Perform other duties as directed by the President or the NJASFAA Executive Council.

### **Membership:**

All Past Presidents who have served a full term as president and are current members (including Lifetime Members) of NJASFAA are eligible to serve on this committee. The current President, President-Elect and Treasurer serves as ex-officio members.

*NOTE: A president who resigns during their term of office will not assume the position of Past-President in future years.*

## CONFERENCE COMMITTEE

### **Purpose:**

The Conference Committee is responsible for developing and coordinating the annual conferences for the membership. Conferences are held in the Fall and Spring.

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

See Section 8 of this document for a complete description of all conference activities.

### **Membership:**

Participation is open to all NJASFAA members.

6/15/07



## **CONSTITUTION AND BY-LAWS**

### **Purpose:**

The Chair of this committee is responsible for presenting all recommended changes to the NJASFAA Constitution and By-Laws to the membership for voting. In those cases where a discussion is required or important for the transparency of the action(s) taken, the vote is to be held at the Business meeting during one of the annual conferences.

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

1. As directed by the Board of Directors, the Committee will:
  - a. Draft language for proposed changes with complete explanation and justification for the change
  - b. Arrange for the distribution of proposed changes only to voting representatives in good standing. A copy of the mailing list should be retained to use in verification of ballots
  - c. Conduct the official vote on all proposed changes at an annual conference

### **Membership:**

The Chair must be a member of the Board of Directors. Participation is open to all NJASFAA members.

6/15/11

## **DEVELOPMENT COMMITTEE**

### **Purpose:**

This committee solicits funds for training activities, the Conference Planning Committee, the NJASFAA web-site and any other sanctioned activities which may need sponsorship.

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

1. The committee works to secure sponsors for NJASFAA meeting activities.
2. Work with all conference planning committees in soliciting sponsors for conference sessions and activities.
3. Coordinate the billing/receipt of funds from sponsors with the Treasurer and each committee chair.
4. Prepare, distribute, and summarize a vendor survey on NJASFAA practices.
5. Solicit and cultivate current and prospective sponsors for all NJASFAA events.
6. Submit contractual agreements to the President and Treasurer for review and signature.

### **Definition:**

The definition of sponsor support is cash or materials that are directly related to an annual conference, training activity or NJASFAA event, i.e. items specifically listed in the event budget. Materials such as door prizes or other giveaways will not be considered "sponsored support" for NJASFAA activities.

### **Membership:**

Participation is open to all NJASFAA members.

*NOTE: Vendor guidelines are included in NJASFAA Policies section 8.*

6/15/07

## **DIVERSITY and INCLUSION COMMITTEE**

### **Purpose:**

This committee is to support financial aid administrators in their service to diverse student populations, working with their colleagues and fellow association members. The committee will also provide training, tools and resources to members of the higher education community as it relates to diversity and inclusion.

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

1. This committee will develop a diversity and inclusion statement for the Association.
2. Collaborate with Conference, Training and Novice Committees to develop programs/sessions which address the objectives related to diversity and inclusion.
3. Review current practices to develop a plan for training and to measure and evaluate outcomes of these programs.
4. Provide the membership with various tools and resources to increase the diversity and inclusion in committees.
5. Increase membership and participation in the Association, its committees and conferences, trainings and workshops.

### **Membership:**

Participation is open to all NJASFAA members.

### **Tools and Resources:**

- NASFAA Toolkit [www.nasfaa.org/diversity\\_toolkit](http://www.nasfaa.org/diversity_toolkit)
- NASFAA Diversity discussion Webinar [www.nasfaa.org/diversity\\_discussion](http://www.nasfaa.org/diversity_discussion)
- Danette Burgess, EASFAA Diversity and Inclusion Chair, Assistant Director, Financial Aid Office, American University Email: [burgess@american.edu](mailto:burgess@american.edu) Phone: 202-885-6110
- Diversity Session topics that Danette can present:  
Difficult Conversations Regarding Diversity in the Workplace, Micro aggressions and Implicit Bias

## **FINANCE COMMITTEE**

### **Purpose:**

The purpose of this committee is to develop the annual budget for the Association, its committees, its activities and its operations. The budget shall be developed from the Association's Long-Range Plan and other planned activities.

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

1. Develop annual budget request forms for each committee, activity and administrative operation and provide relevant budgetary information on the previous years revenues and expenditures.
2. Review and recommend the fiscal year expenditure authorizations and projected revenues for Executive Council approval.
  3. Monitor revenue and expenditure activity throughout the fiscal year, and recommend increases and/or decreases to specific budget lines as needed.
  4. In the event of vacancies in the Vice President and/or Past Treasurer position, the Chair of the Finance Committee has responsibility for reviewing all bank statements.
5. Submit an annual report to the Executive Council at the September meeting following May 31 year end and provide an annual report to the Association at the Fall Conference.

### **Membership:**

Committee Chair is the Vice-President. Other members include Past President, President, President Elect, Past Treasurer, Treasurer (as ex-officio member of the Finance Committee) and Chair of Membership committee. Additional participation is open to all NJASFAA members.

5/18/10

## **GOVERNMENT RELATIONS COMMITTEE**

### **Purpose:**

This committee is responsible for tracking, evaluating, and disseminating information related to Federal and State Regulations during the year.

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

1. Responsible for the development of position papers/letters on the impact of proposed changes to Federal or State legislation for action by Executive Council. Committee is responsible for providing newsworthy information and soliciting input and feedback from the membership
2. Co-chairs are responsible for moderating a Federal and/or State Update session at each conference
3. Committee is responsible for coordinating training session/workshops as dictated by activity. These events need coordination with EASF AA and NASFAA
4. Prepare a list (names, telephone, fax numbers) of the key legislative players (Federal and State) for the President, PR Chair and membership
  - a. Develop long term relationships in order to effectively communicate with these individuals
5. Work with the Executive Council on legislative advocacy when appropriate
6. Provide a representative at all meetings of the HESAA Board meetings
  - a. Be prepared to provide testimony/comments when necessary

### **Membership:**

Participation is open to all NJASF AA members.

6/1/15

## **MEMBERSHIP COMMITTEE**

### **Purpose:**

The committee is charged with recruitment and retention of NJASFAA membership, the management of membership records and the database on the NJASFAA web-site. Either the Treasurer or Membership Chair, as appropriate, will supply labels upon request.

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

1. Send membership solicitation to non-members following the Spring Conference.
2. Conduct annual review of the membership database; make effort to ensure that each institution has at least one member in the Association. Provide information to the President which would permit outreach to individual schools to meet this goal.
3. Provide statistical information about membership upon request.
4. Sit on the Finance committee.
5. Develop and send an email blast (at least twice per year) to the entire membership with reminder for individuals to update their NJASFAA profile.
6. Work with the manager of the NJASFAA e-mail list to ensure that all e-mail addresses are maintained and accurate.
7. Responsible for ensuring a smooth transition from year to year by documenting computer procedures and training his/her successor.
8. Ensures that all committee members are members of the Association.

### **Membership:**

Participation is open to all NJASFAA members.

*NOTE: Calendar of Events – see Appendix E.*

5/11/10

## **NJ FAFSA DAYS COMMITTEE**

### **Purpose:**

The purpose of this committee is to plan and coordinate the annual FAFSA Days in NJ, including selection of dates, development of the annual budget, public relations outreach.

FAFSA Days is a program that provides free information and assistance to New Jersey families applying for financial assistance for higher education. FAFSA Days mobilize financial aid and other professionals from New Jersey colleges and universities to help families complete the Free Application for Federal Student Aid (FAFSA), the federally required form for students seeking financial aid, including grants and loans, throughout the nation.

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

### **Membership:**

Participation is open to all NJASFSA members.

6/23/16

## **NOMINATIONS/ELECTIONS**

### **Purpose:**

This committee is responsible for soliciting nominations for NJASFAA offices, preparing the annual slate of candidates and carrying out a fair nomination and election process. All Past-Presidents are encouraged to assist in the solicitation of candidates.

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

1. Develop slate of nominees and obtain candidate resumes to be submitted to the membership for annual election activity via electronic ballot prior to the Spring Conference each year.
  - a) It is the committee's responsibility to fully inform potential candidates of the job description for the appropriate office and provide some indication of the level of commitment required for the position in question.
  - b) Responsible for ensuring that each candidate has obtained permission from their supervisor to run for office.
2. Schedule and supervise the NJASFAA election process. Coordinate development of email ballot with the Chair of the Technology Committee.
3. Encourage NJASFAA members to fully participate in the NJASFAA elections process.
4. Encourage and support NJASFAA members to run for elected EASF/NAASF offices and participate fully in the NJASFAA election process.
5. At the Spring Conference, Chair must make a motion to accept the election results and to destroy the ballots of the previous year's election.
6. Responsible for the solicitation and selection of NJASFAA Distinguished Service Award recipients.

*NOTE: See Appendix D for additional information related to election procedures.*

### **Membership:**

The immediate Past-President is the Chair of this committee and includes several other Past-Presidents.

5/18/10



## **NON-TRADITIONAL EDUCATION COMMITTEE**

### **Purpose:**

This committee addresses the unique needs of Rabbinical, Proprietary, Nursing and Voc-Tech institutions and any institution that offers non-traditional programs and serves as a forum for training and problem resolution.

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

1. Responsible for meeting a minimum of four (4) times per year to collectively identify and explore solutions to common problems.
2. Assist the Training Committee with identifying and addressing various needs of the proprietary sector for training or conference sessions.
3. Formulate a proprietary sector position on issues confronting the NJASFAA Executive Council.

### **Membership**

Participation is open to all NJASFAA members. It is recommended that Chair of this committee also sit on the Government Relations committee.

5/10/09

## **NOVICE TRAINING/MENTORING**

### **Purpose:**

This committee plans and conducts the Novice Training Workshop every other year. This residential training week provides basic training in all areas of financial aid to our newest members (those with less than 2 years' experience). In addition, this committee fosters relationships between new financial aid administrators (mentees) and seasoned, experienced financial aid administrators (mentors) to assist them in building a career in financial aid. Provides membership with opportunities to network outside of training and conferences.

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

1. Develop and arrange the biannual intensive training week for new members
2. Solicit trainers from within the financial aid community to teach the various topics
3. Arrange for a residential experience which fosters networking and camaraderie
4. Schedule social networking and training events throughout the year

### **Membership:**

Participation is open to all NJASFAA members.

9/18/17

## **PUBLIC RELATIONS COMMITTEE**

### **Purpose – Public Relations:**

This committee disseminates timely and accurate information to the membership of the association. In addition, information related to financial aid may be released to students, parents, the guidance community, and politicians, as deemed necessary by the Executive Council.

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

1. Serves as public relations officer for the Association. Provides notices to the membership about each major activity accomplished by the Association (e.g. training events, conferences, legislative activity).
2. Work with Government Relations to maintain information on the Federal and State Legislative Liaison Networks and coordinates activities of these groups.
3. Develop strategies to improve the image of student financial assistance among various constituencies.
4. Archives all photos of NJASFAA related events on the website.

### **Membership:**

Participation is open to all NJASFAA members.

9/19/17

## **TECHNOLOGY COMMITTEE**

### **Purpose:**

This committee is composed of skilled financial aid technology users and is responsible for training, testing, evaluating and recommending enhancements to financial aid technology processing.

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

1. Provide training to Executive Council members on use of the NJASFAA web-site.
2. Review the web-site use to determine appropriate enhancements, upgrades or revisions to functionality.
3. Act as the liaison with technology vendor and serve as a resource group for evaluating technology for Association members.

### **Membership:**

Participation is open to all NJASFAA members.

6/15/07, 6/18/21

## **TRAINING AND PROFESSIONAL DEVELOPMENT COMMITTEE**

### **Purpose:**

The primary purpose of the committee is to plan and arrange for all training and professional development activities. The committee will serve as liaison for EASFAA/NASFAA training activities that require regional association involvement.

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

1. Develop and promote an annual calendar of training activities.
2. Plan, coordinate, supervise and direct all training activities within NJASFAA, including site selection, registration activities, refreshments, etc.
3. Coordinate training activities with Department of Education Region II.
4. Coordinate with EASFAA/NASFAA on any decentralized training workshops approved by the NJASFAA Executive Council.
5. Develop budgets and timetables to implement goals and objectives of the committee.
6. Provide assistance to the Conference Planning committee concerning special interest sessions.
7. Plan and carry out all of the functions necessary to provide for neophyte training sessions every year, including participation in the Novice Training week (every other year).
8. Make recommendations to the Executive Council on the professional development needs of the membership.

### **Membership:**

Participation is open to all NJASFAA members.

5/18/10

## 7.0 MEETINGS

### 7.1 Meetings

The Executive Council will meet once per month as needed with meeting dates being established at the June meeting. Non Standing Committee Chairs shall be invited to participate in meetings as determined necessary by the President.

Executive Council meetings are open to all active NJASFAA members. Any member who wishes to address Executive Council must notify the Secretary two days in advance. Meeting agendas are available from the Secretary two weeks prior.

### 7.2 Meeting Agendas

Meeting agendas will be prepared and distributed by the Secretary at least two weeks in advance of each meeting. Brief reports on committee activities will be prepared in advance at the discretion of the President and Chairs.

### 7.3 Location of Meetings

Location of the NJASFAA Executive Council meetings will be determined by the President and Council.

### 7.4 Meeting Minutes

Unofficial minutes will be distributed by the Secretary to the Executive Council with the next meeting's agenda.

### 7.5 Parliamentary Procedures

What You Always Wanted to Know, But Were Afraid to Ask

#### 1. How Motion Introduced

- a) Member makes motion
- b) Another member seconds motion
- c) Modification/Withdrawal of motion
  - i) Maker can modify/withdraw motion before Chair states questions.
  - ii) Maker modifies prior to Chair stating questions; person seconding motion can withdraw.
  - iii) Another member (not maker or seconder of initial motion) requests modification by maker. If modification accepted, suggester has seconded modified motion; no other second necessary.

#### 2. Chair states question on motion

- a) Motion is pending.
- b) Motion is open to debate.

### 3. How Debate Handled

- a) Three cases where floor assigned to person who may not have been first to rise and address chair
  - i) Member is making motion, has not already spoken, preference over others.
  - ii) No one entitled to floor second time in debate on same issue, same day, if other member not spoken desires floor.
  - iii) Chair knows persons seeking floor have opposing views. (Member to be recognized not determined by 1 or 2 above). Floor alternates between those favoring and opposing.
- b) Speaking in Debate
  - i) Each member right to speak twice same question, same day
  - ii) Member spoken once cannot make second speech, same question, if other member not spoken on question desires floor.
  - iii) Asking question, making brief suggestion not considered speaking in debate.
- c) Closing Debate

### 4. Presiding officer after each member has exhausted right to debate or not further debate.

- a) Order of assembly.
- b) Move the previous question (move to vote now).
  - i) Brings assembly to immediate vote
  - ii) Takes precedence over all debatable or amendable motions.
- c) Out of order when another has floor.
  - i) Must be seconded.
  - ii) Not debatable or amendable.
  - iii) Requires 2/3 vote.
- d) Limit or extend limit of debate.
  - i) Reduce number of length of speeches permitted; require certain hour or specified length of time debate to close.
  - ii) Takes precedence over all debatable amendable motions.
  - iii) Out of order when another has floor.
  - iv) Must be seconded.
  - v) Not debatable.
  - vi) Is amendable; any amendment not debatable
  - vii) Requires 2/3 vote.

### 5. How Vote Handled

- a) Chair puts question
  - i) States exact question assembly deciding.
  - ii) May explain effect of "aye" vote and "no" vote.
- b) Chair takes vote
  - i) By voice.
  - ii) By show of hands.
  - iii) Affirmative vote called first.
  - iv) Negative vote always called for.
- c) Chair announces results
  - i) Report of voting, stating which side has motion.

- ii) Declares motion adopted or lost.
- iii) States effect of vote or orders execution.
- iv) Announces next item of business, as applicable.



## 8.0 NJASFAA POLICIES

### 8.1 *Alcohol Policy*

NJASFAA will not pay for alcoholic beverages in conjunction with Executive Council Meetings or Committee Meetings. There may be NJASFAA sponsored events where the serving of alcohol is deemed appropriate. NJASFAA Executive Council can authorize events (i.e. Annual Conference) to include alcoholic beverages and may chose to set limitations on the amount and/or the amount of time during meals and/or receptions at those events during which alcohol could be served without charge.

- A. NJASFAA does not typically pay for alcohol consumed by members, officers, committee chairs, etc. Notwithstanding the above, Executive Council may, at its discretion, authorize scheduled events during the Annual Conference, Retreats and other Association Events when alcohol will be served and not billed to the individual.
- B. Typically, alcohol ordered at NJASFAA meetings, events, dinner, etc. should be ordered by individuals and billed individually.
- C. Members of group dinners should request separate checks to avoid having alcohol consumed at the table billed to NJASFAA group bills.
- D. Committee chairs and other event leaders need to remind members of this policy.

6/20/11

### 8.2 *Archiving Policy*

All NJASFAA minutes and correspondence will be stored on the NJASFAA website. It shall be the responsibility of the Secretary to upload all minutes and other appropriate correspondence to the website for history.

### 8.3 *Collections Policy*

Beginning with the 2016-2017 Academic-year NJASFAA implemented its new on-line payment option for yearly membership payments, as well as training and conference registrations. In addition, NJASFAA has not had a documented collection policy to assist in its handling of delinquent account receivables.

The purpose of this policy is to:

- Define the parameters for the registration of NJASFAA events when the registrant has an outstanding balance due.
- Define the collection of delinquent accounts receivable for monies owed to NJASFAA at any particular time.
- Define the authority for the write - off of receivables.
- Communicate to the Board of Directors and the membership the formal policy of the Executive Council regarding the collection of delinquent accounts receivable.

This policy applies to all Funds of NJASFAA recorded as part of their accounting activities on the General Ledger of the Association.

The Treasurer shall be responsible for the implementation and administration of this policy.

Delinquent account receivables are monies greater than 90 days past the date the payment was due that are legally owed to the Association at any particular time and represent assets. Examples may include, but are not limited to, the following:

- Amounts billed by the Association for conferences, trainings and memberships.

The write-off of Accounts Receivable is the removal of an amount, or part of an amount, of money owed to the Association that had been determined to be a receivable, from the accounts receivable ledger. Amounts for which the Association has attempted to collect in good faith that exceed a two year period shall be deemed eligible for a write-off via a vote from Executive Council.

The write-off will not remove the adverse history notation from the on-line registration system. On a case by case basis individuals can petition for removal by contacting the Treasurer and submitting an explanation of why payment cannot be made.

Process:

- A. All event and annual membership registrations/renewals are done on-line at njasfaa.org.
- B. Upon registration for an event, or an annual membership renewal, the on-line system will review the registrants account to determine that there are no outstanding receivables older than 90 days from a previously registered and attended event.
  - a. If the registrant has no outstanding receivables they will be given the option to pay on-line via credit card or to print out an invoice and pay via hard copy check. The registration will be processed.
  - b. If the registrant is determined to have an outstanding receivable that is older than 90 days they will be presented with only an option to pay with a credit card in order for their registration to be processed. If they do not/cannot pay via credit card the registration will not be processed and a message to contact the Treasurer will be displayed.

Collection procedures for receivables:

- A. An invoice must be prepared, recorded and delivered to the debtor as soon as practical after the receivable is created and the debtor must provide payment prior to the event registered for or, if possible, 60 calendar days from the date of the invoice (whichever comes first).
- B. If payment is not received prior to the event date, the registrant shows up for the event and the registrant has no adverse payment history, they will be allowed to attend.
- C. If payment is not received prior to the event date, the registrant shows up for the event, payment arrangements have not been made in writing with the Association and the registrant has adverse payment history, they may not be allowed to attend.

- D. If within 60 days from the date of the registered and attended event payment has not been received the debt is considered an overdue receivable and a reminder will be sent to the registrant.
- E. If payment is not received during the next 30 days, i.e. within 90 days from the date of the event, the Treasurer shall attempt to collect again by notifying the debtor in writing that payment is now overdue and payable immediately.
- F. If payment is not received during the next 30 days, i.e., within 120 days from the date of the event, the overdue receivable becomes a delinquent account receivable. The Treasurer shall:
  - c. Notify the debtor in writing that payment is now overdue and payable immediately; and,
  - d. If no payment is made within 10 days from the date of the notification, the delinquent account will prevent the individual from attending future Association sponsored events.
  - e. If the payment is received after this 10 day period the Association reserves the right to limit future payment options for events.
  - f. In addition, the Association reserves the right for the outstanding debt to be referred to a collection agency or collections bureau immediately.

Referral for collection –

The Association may refer to a collection agency on the 11<sup>th</sup> day that no payment is received once the account is at least 120 days old.

Review-

The Treasurer may review this policy and make recommendations for changes as needed.

4/28/17

**8.4 *Conference and Workshop Policies***

**A. Membership Dues Payment**

Annual dues for NJASF AA are established by the Executive Council. The membership year is June 1 through the following May 31. If dues are not paid, individuals attending conferences or workshops will be charged the membership fee to attend. Requests to bill for dues after conferences or workshops will be refused. Membership fees are not transferable and non-refundable.

**B. Registration Fee Refund Policy for Annual Conference/Workshops**

- a) All requests for refunds shall be in writing and sent to the Treasurer for approval. The Treasurer may consult with the President before approving a request.
- b) A 100% refund shall be granted if the request is postmarked or emailed 15 calendar days or earlier, prior to the start of the activity. The Treasurer shall confirm that the fee was received and issue the refund.
- c) Exceptions for extenuating circumstances to item b) above may be granted upon

approval of the Treasurer and the President. Such requests must be postmarked within 15 days after the activity. The Treasurer may request documentation for the extenuating circumstance or may approve request without documentation. Up to 50% may be refunded.

#### C. Registration Fee – Non-Payment/No Shows

10/26/17

A registrant who has not made a payment and does not attend the conference or training event will be responsible for the registration and/or membership fee in full and will be billed accordingly. If the registrant is not planning to attend, a cancellation request must be submitted at least 15 calendar days prior to the event. Until an outstanding balance is satisfied, the member will not be allowed to register and attend any future NJASFAA sponsored events.

#### D. Reimbursements, Honoraria, and Travel Expenses

***“...the consensus of the group [Executive Council meeting 2/17/00] is that the spirit of volunteerism will reign. NJASFAA members will not be paid for making financial aid or non-financial aid related presentations at training sessions or conferences.”***

- a) Individuals who meet the definition of NJASFAA membership are considered to be members for the purpose of this policy. 5/22/20
- b) NJASFAA members who serve as conference speaker/presenters/moderators may not be reimbursed for any personal expenses related to the conference (i.e., registration, transportation or room and board). This general policy also applies to individuals who work for agencies whose business is financial aid (e.g., ACT, CSS. etc.).
- c) An honorarium may be paid to individuals who are designated "keynote" speakers at Annual Conferences.
- d) An exception to this policy may be made by the Conference Planning Chair and President for those members who are non-practicing financial aid administrators who would otherwise not receive reimbursement for their expense.
- e) The Conference Planning Committee is authorized to pay travel expenses, hotel accommodations and meals for nonmember speakers for appropriate periods.
- f) The Conference Planning Committee will ask if the non-member speaker(s) will charge any additional fees (i.e., honorariums, stipends). It is suggested that \$200 is a reasonable guideline for interest session speakers. Approval of the Conference Planning Committee Chair is needed before final commitments are to be made.
- g) Any speaker honoraria of \$500 or more require a written contract. The President reviews and signs such contracts.

h) The NJASFAA Conference Registration fee is ***not*** paid for the NJASFAA President.

#### E. Complimentary Room Policy

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

- One room/suite for the NJASFAA President.
- One room/suite for Conference Chair
- Guest Speaker(s)
- Treasurer
- Site Chair
- Registration Chair

### 8.5 *Conference Vendors and Exhibitors Policy*

#### A. Policies

- a) The Association will encourage sponsorship of functions by outside organizations at NJASFAA conferences.
- b) The Association shall provide a designated vendor display area at all conferences
- c) Exhibitors and vendors will receive visibility only through Association channels or by direct Association approval.
- d) The Association will charge each exhibitor and vendor an amount which covers all costs incurred by the event. Events may have multiple exhibitors.
- e) The Association will accept no advertisements within the conference programs. For any sponsor paying for program printing, the back cover can be used as advertising space.
- f) Exhibitors/vendors choosing not to exhibit at the annual multi-day conference will not be entitled to any benefits listed in this section.

#### B. Procedures

The Development Committee will be responsible for coordinating vendors and exhibitors and their functions at NJASFAA events.

#### Exhibitors/Vendors

- a) Exhibitors/vendors serving the aid profession will be actively invited to display their product/service.
- b) All approved exhibits will be displayed in an area designated for that purpose by the Association.
- c) The distribution of any promotional material by an approved exhibitor will take place only in the area designated for exhibitor displays.
- d) There will be no promotional material distributed by any unapproved exhibitor
- e) Each exhibitor will receive credit for his/her participation in the conference program.
- f) There will be no free registrations for exhibitors. Exhibitors wishing to attend

conference functions will pay the appropriate registration fee.

10/17/17

## **8.6 *Contract Signing Policy***

**Commitments for services that require a written contract must be approved by the Executive Council. The President, Vice President, and Conference Chair are authorized to sign contracts on NJASFAA's behalf.**

- A. Contracts which involve hotels and/or conference center properties will be reviewed by the appropriate committee Chairs and approved by the Executive Council. If timeliness is a factor, a transmittal and discussion of the contract via any means available (fax, phone, e-mail) may be held by the Executive Council with subsequent vote taken to decide the matter.
- B. Contracts which involve non-hotel and/or meeting site properties, i.e., printing, supplies, entertainment groups, etc., will be reviewed by the responsible committee Chairs for the activity/event prior to contract signature by the President or Treasurer.
- C. Each Committee Chair has the authority to add additional services to an existing contract, as necessary, up to \$1,000. The Committee Chair must report the addition to the Executive Council. Additional services over \$1,000 must be approved by the Finance Committee, and must be signed by the President.

NOTE: "Contract" in this policy statement is meant to include purchase orders, letters of intent, or any similar documents.

## **8.7 *Correspondence on behalf of the Association***

All notices and letters developed and sent to outside entities on behalf of the Association (e.g. elected officials, agency representatives) must be discussed, reviewed and approved by the entire Executive Council. Although a discussion and review is most appropriate at a regular meeting to allow for a reasonable exchange of thoughts and positions, the manner of this review is up to the President. In the event of an email discussion, all members of the Council will be included in the discussion to provide for the widest representation of ideas. A vote will be taken of all voting members before any correspondence is sent.

6/15/11

## **8.8 *Credit Card Fee for Payments***

NJASFAA will accept credit card payments for items including, but not limited to, annual membership dues, conference registration fees, etc. A service fee of \$XXX will be charged for each transaction. The payee will be informed prior to completing the credit card transaction on the website.

## **8.9 *Crowd Release for photography/filming***

By entering and/or by your presence at any NJASFAA event, you consent to be photographed, filmed and/or otherwise recorded. Your attendance constitutes your consent to such activity and to any use, in any and all media through perpetuity. You understand that all photography, filming and/or recording is done in reliance on this consent given by you by attending an event.

If you do not agree to the above, please do not enter the event area.

### **8.10 Debit Card**

NJASFAA will open a new Business Checking account for the express purpose of obtaining a debit card(s). The President-Elect, Treasurer, and Treasurer-Elect will be the signers of the new account. Executive Council may designate another elected officer or allow less than three elected officers to be the signers. The President-Elect and Treasurer-Elect will keep their debit cards as President and Treasurer. The President, President-Elect, Treasurer, and Treasurer-Elect will be authorized to approve the use of the debit card. Non-NJASFAA expenses cannot be paid with the debit card.

The debit card account will maintain a maximum limit of \$3,000 and, the maximum purchase that may be made using the debit card will be \$2,500. This account has a \$10 fee, which is waived if we maintain a minimum daily balance of \$500. We will replenish the funds in this account from the general bank account as needed.

#### **Procedures:**

- All transactions follow the same approval process as used for checks. Any requests for debit card payments must be submitted to the Treasurer accompanied by an Expenditure Form with required signatures. Treasurer will contact the vendor to make the payment using the debit card. In the absence of the Treasurer, Treasurer-Elect or President-Elect can make the payment with their cards.
- Receipts for approved expenditures must be submitted within 30 days of the purchase to the Treasurer.
- The Treasurer manages the debit card records and transactions – similar to the current process.
- The Past-Treasurer and/or Treasurer-Elect review the monthly bank statement associated with the debit card to detect any unauthorized charges and ensure compliance.
- The debit cardholders must keep their cards secured at all times.
- An existing signer will request the bank to remove the outgoing President and Treasurer as a signer on the account and their debit cards will be deactivated immediately. New signers will be added at this time. These activities should be completed preferably by mid-June.
- The majority of the bills are paid using the 30-day invoice method through a check from the general bank account. Debit card usage can and should be used for, although not limited to, the following charges (all requests are subject to approval):
  - Annual holiday luncheon, refreshments for professional development trainings
  - Annual NJASFAA Retreat
  - National and regional conference expenses including hotel, registration fees, airfare, etc.
  - Payments to vendors if and when sending a Wells Fargo payment will result in a late payment

- Payments to the NJ Department of Treasury
- QuickBooks annual payment
- Zoom annual payment

12/20/20

### **8.11 *Email Discussion and Vote***

On those occasions where expediency is an issue, the Executive Council may choose to conduct its business using electronic formats. In these cases, the issue in question can be motioned, seconded and discussed in the following manner:

A. Any member can bring up a topic but the topic must be motioned and seconded only by voting members of the Council.

B. Discussion is to involve all members of the Council to ensure transparency.

C. A vote can be called and all available voting members must register their vote.

D. The entire trail of the discussion and vote must be entered into the minutes at the next regularly schedule Executive Council meeting.

6/15/11

### **8.12 *Fidelity Bond***

A fidelity bond insurance policy was purchased by the association to cover any occurrence of embezzlement or theft of funds or property by any officer of the association, with a maximum claim amount of \$100,000. An annual premium must be paid to keep the policy in effect and should be an annual budgeted expense. The policy covers any officers elected to the organization annually; the policy does not provide individual bond coverage.

### **8.13 *Insurance Policy***

NJASFAA shall be responsible for the purchase of insurance in order to safeguard the corporation and its members. The Treasurer will review the policy on an annual basis to ensure adequate coverage for members, including meetings, conferences, training events, the annual retreat, etc.

#### **A. General Liability**

The General Liability Insurance Policy is to protect the Corporation with regard to personal property, valuable paper, income loss, money coverage, fire, medical product, property damage, advertising liability, host liquor, personal injury, hired and non-owned automobile and blanket contractual.

### **8.14 *Investment Policy***



The purpose of an investment policy is 1) to safeguard the funds of the Association and 2) to produce as much interest income as possible. The Treasurer, in consultation with the Executive Council, shall be authorized to invest NJASFAA funds. A review of the investments shall be performed annually by the Executive Council or more often if deemed necessary because of economic conditions or the needs of the Association.

The General Fund, Reserve fund and Surplus will be involved in the investment plan. The Treasurer is authorized to invest in:

- A. Certificates of Deposit
- B. Money Market Funds
- C. Corporate Bonds
- D. U.S. Treasury and Agency Securities

The Treasurer is authorized to use an investment firm, bank and/or credit union to assist in the management of the Association's assets. Only those investments issued by the U.S. Treasury or Agencies of U.S. Government or those bond funds with investment grade ratings - AAA through BBB are authorized. No more than 10% of the investment portfolio should be invested in Corporate Bonds.

### **8.15 *Music Licensing Agreement***

Under the U.S. Copyright Law, the public performance of copyrighted music requires permission from the copyright owner or its licensing agent. The law affects all associations that use either live or recorded music at association sponsored events including conferences or other meetings. BMI (Broadcast Music Incorporated) and ASCAP (the American Society of Composers, Authors, and Publishers) are the largest licensing agents. This is not a new law, but it was not widely enforce until about 1990 when BMI and ASCAP began to enforce it.

In 2008, the association purchased a standard 'Meetings, Conventions, Trade Shows, and Expositions' Music Performance Agreement from BMI. This agreement requires that the association pay a base annual fee each year in January (\$135 in 2008). Within 30 days of the agreement renewal date (Jan. 1), the association will report the total number of registered persons for all events during the year. If applicable, the association will pay the remainder of the fee for the prior year. The additional fee does not apply until the number of conference attendees exceeds 2,250.

### **8.16 *Procurement Policy***

The Procurement Policy applies to the purchase of goods. The dollar amount of the purchase determines the required approval process.

- A. Purchases up to \$450:  
The Committee Chair has the authority to make purchases of \$450 or less without seeking additional approval.

B. Purchases from \$451 to \$1,000:

For purchases between \$451 and \$1,000, the committee must obtain a written quote from 2 vendors. The Committee Chair has the authority to choose the most favorable vendor, and must report the decision to the Executive Council.

C. Purchases over \$1,000:

The Finance Committee must approve all purchases over \$1,000. The Committee must obtain written quotes from 2 vendors and forward the quotes to the Vice President for review. The Vice President, along with the Finance Committee will respond within 3 business days with a decision. The Committee Chair will report all decisions to the Executive Council.

Exceptions:

If appropriate due diligence has been performed in the last two years, this procedure may be waived.

If a specific item is not easily obtainable, this policy may be waived.

This policy does not necessarily apply to services.

## **8.17 Record Retention and Destruction Policy**

### **A. Purpose**

To comply with applicable records retention and disposition requirements in accordance with federal and state guidelines.

This policy provides for the systematic review, retention and destruction of documents received or created by NJASFAA in connection with the transaction of official NJASFAA business. This policy covers all records and documents, regardless of physical form (including electronic documents), contains guidelines for how long certain documents should be kept and how records should be destroyed. The policy is designed to ensure compliance with federal and state laws and regulations, to eliminate accidental or innocent destruction of records and to facilitate NJASFAA's operations by promoting efficiency and reducing the unnecessary need and expense of retaining records which no longer have any valid need to be so retained.

### **B. Document Retention**

NJASFAA follows the document retention procedures outlined below. Documents that are not listed, but are substantially similar to those listed in the schedule will be retained for the length of time listed for those substantially similar documents.

#### **Association Records**

Annual Reports	Permanent
Articles of Incorporation	Permanent

Constitution and By-Laws	Permanent
E.I.N. Allotment Letter	Permanent
Fixed Asset Records	Permanent
IRS Application for Tax-Exempt Status	Permanent
IRS Determination Letter and related papers	Permanent
Meeting Minutes, Executive Council and Committee	Permanent
Policies and Procedures/Resolutions	Permanent
State Sales Tax Exemption Letter	Permanent
Correspondence (general)	2 years
<b><u>Accounting and Tax Records</u></b>	
Financial Statements	Permanent
General Ledgers	Permanent
IRS 990 Tax Returns	Permanent
Annual Audits/Reviews	7 years after close of audit
Accounts Payable/Expense Records	7 years
Accounts Receivable/Sales Records: (Membership dues, conference fees)	7 years
Cash Receipts	7 years
Credit Card Receipts	7 years
Donor Records and Acknowledgement Letters	7 years
IRS 1099s	7 years
Journal Entries	7 years
Grant Applications and Contracts	5 years after completion
Invoices	5 years
<b><u>Bank Records</u></b>	
Check Registers	Permanent
Bank Deposit Slips	7 years
Bank/Investment Statements and Reconciliation	7 years
Electronic Fund Transfer Documents	7 years
<b><u>Legal, Insurance and Safety Records</u></b>	
Copyright/Trademark Registrations	Permanent

Insurance Policies	Permanent
Accident Reports	5 years
Contracts (after expiration)	5 years
Leases	5 years after expiration

**C. Electronic Documents and Records**

Electronic documents including e-mails will be retained as if they were paper documents. Therefore, any electronic files that fall into one of the document types on the above schedule will be maintained for the appropriate amount of time. If a user has sufficient reason to keep an email message, the message should be printed in hard copy and kept in the appropriate file or moved to an “archive” computer file folder. E-mails not falling within one of those of those categories should be deleted after 1 year.

**D. Emergency Planning**

NJASFAA’s records will be stored in a safe, secure and accessible manner. Documents and financial files that are essential to NJASFAA’s operations will be duplicated or backed up at least monthly or as often as practicable and maintained off site.

**E. Document Destruction**

NJASFAA’s President or his or her designee is responsible for the ongoing process of identifying its records and for ensuring the destruction of those records after any such records have achieved their maximum retention periods. Destruction of financial and personnel-related documents will be accomplished by shredding.

*Document destruction will be suspended immediately, upon any indication of an official investigation or when a lawsuit is filed or appears imminent. Destruction will be reinstated upon conclusion of the investigation after advice and approval of counsel.*

3/23/12

**8.18 Reserve Fund Policy**

- A. The Reserve Fund has been established as capital reserve for the Association to be set aside for contingencies.
- B. The level of funds to be maintained in the Reserve Fund should not go lower than the contracted commitments for the annual conference(s) on a yearly basis plus annual insurance and accounting fees.
- C. The intent of the Reserve Fund is to have funds available to meet unusual income shortfalls. Any withdrawal from the fund is to be defined a capital liquidation and therefore should be considered an extreme measure. Withdrawals from this fund should only be made after consultation with the President and a unanimous vote of the Executive Council.

- D. The Reserve Fund shall be so identified and maintained in a separate interest bearing account and managed according to sound financial investment policies. A separate report format shall be a part of any Treasurer's report detailing the balance of the fund and interest earned. Any adjustment required to maintain the reserve requirement shall be made at least annually.
  
- F. The Treasurer must seek and receive approval of the Executive Council to move investment accounts and retain or discharge professional persons (e.g. accountant, lawyer, broker) prior to any change.

### **8.19 Revenue and Expenditures Policy**

At the beginning of every term, the President will work with the Finance Committee and the Treasurer to develop a balanced budget for the next fiscal year. In order to achieve a balanced budget, it is essential that ALL NJASFAA funds are managed by the Treasurer, including all income deposited into a NJASFAA account, all investment accounts, and all expenses paid from the account. This will simplify and expedite the filing of the IRS tax return and the annual audit. It also facilitates cash flow and maximizes interest income. The following outline details specific policies and procedures with respect to NJASFAA's fund management.

The Treasurer shall have sole responsibility for all of NJASFAA's financial transactions including:

- a) Check writing
  - i) Issuing refunds and reimbursements
  - ii) Payment of expenses
- b) Receiving of all income
- c) Reconciliation of bank statements
- d) Investment activity

#### **1. Checking Accounts**

- a) NJASFAA shall have only one checking account: it shall be an interest bearing account at the highest possible interest rate
- b) Signatories will include the following:
  - i) Treasurer
  - ii) President
  - iii) Vice President as Chair of Finance Committee
- c) The address of the Treasurer shall appear on the account
- d) All checking account deposits will be made in a timely fashion.
- e) Accounts payable shall be made within 30 days. Every effort will be made to reimburse individual NJASFAA members as quickly as possible.
- f) The Treasurer is not authorized to cash personal checks.
- g) A purchase order does not constitute payment for any Association activity.

## 2. Conference and Workshop Account Receivables

- a) Within 30 days after the conclusion of an event, the event coordinator and the Chair of the Development Committee shall submit a complete list of outstanding accounts to the Treasurer.
- b) The Treasurer shall be responsible for billing and collecting these in accordance with NJASFAA policy.

## 3. Membership Dues Income

- a) Received by the Treasurer with a membership form.
- b) Deposited in a timely fashion to the NJASFAA checking account.
- c) Membership lists routed to the Membership Committee Chair as needed.

### **8.20 Sales Tax Reimbursement Policy**

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

Effective July 1, 1993 it is the responsibility of each officer, committee Chair, and committee member to follow through on this exemption. When making purchases or contracting for services, the NJASFAA member must advise the vendor of the tax exemption status in advance to preclude any sales tax charges. Proof of tax exemption status or the Federal I.D. number may be required. It is requested that each officer or chair reviews all charges carefully and if in doubt contact the NJASFAA Treasurer.

IRS FORM 5372 (DO (5-77) may be used to provide proof of exemption from sales tax (copies can be obtained from the Treasurer.

### **8.21 Stale Check Policy**

1. All NJASFAA checks will be marked "VOID AFTER 90 DAYS."
  - a) If a check becomes void, it is the payee's responsibility to request in writing that a duplicate is issued. Such request will be sent to the Treasurer. If no request is received, the check will be declared "Stale."
2. A stale check that is later reissued will be charged to:
  - a) The same account from which it was originally issued if the fiscal year records are still open.
  - b) An account in the current year title "Prior year(s) expenditures"<sup>11</sup> when the stale check is from a closed prior fiscal year.
3. An ongoing "Stale Check Record" will be maintained as a part of NJASFAA's permanent financial records.
  - a) It will not be openly publicized to the membership.
  - b) A copy will be made available upon request to any NJASFAA member.

NOTE: By declaring a check stale, NJASFAA is not relinquishing its obligation to the payee. However, NJASFAA does not deem it necessary to remind the payee to cash a check.

### **8.22 Tax Returns**

NJASFAA is required to submit Federal and NJ State tax returns on an annual basis. The Association will submit all necessary documentation to the auditor after the close of a year for filing in August of that year.

Based on a tax year which ends 6/30, following are the dates the returns must be filed:

Federal Return	11/15
NJ Charities Annual Report	12/31

An annual review will be conducted regularly; an Audit will be conducted approximately every three years to ensure the Association is in good standing related to its financials.

6/13/13

### **8.23 Travel Expense Reimbursement Procedure**

All association travel must be authorized by the Association's President and Executive Council, either in writing or verbally, before travel costs are incurred.

The NJASFAA Travel Expense Claim and required receipts must be submitted to the Treasurer for reimbursement of travel expenses. Reimbursement will be made in accordance with the following guidelines: (In all cases, the least expensive means of transportation should be chosen).

1. Commercial Transportation:

Commercial transportation (coach rate) will be reimbursed at actual cost with receipt. Air reservation should be made as early as possible in order to take advantage of lower rates, i.e., "super saver" fares.

2. Private vehicle:

Privately owned vehicle transportation shall be reimbursed at the current per mile rate allowed by IRS. Reimbursement for such cannot exceed the cost of commercial airfare unless approved by the Executive Council. Calculation of mileage must be from either home or institution, whichever is closer to the destination.

3. Lodging:

Reasonable and prudent expenses for lodging shall be reimbursed at actual costs with a receipt. Phone calls will not be reimbursed.

4. Meals:

Meals, including tax and tip, shall be reimbursed at the rate of up to \$50.00 per full or partial day upon submission of receipts.

5. Alcohol:

Refer to the NJASFAA Alcohol Policy

6. Limousine, Cab, Parking and Other Fares:

Actual costs for limousine, cab, parking and other fares up to a maximum of \$10.00 per fare or fee will be reimbursed without receipts. Requests for reimbursement in excess of said amount must be accompanied by receipts.

7. Travel to Committee Meetings

Effective 7/1/05, travel to committee meetings may be reimbursed for individuals who may not receive reimbursement from their employer. If the total round trip is greater than 40 miles, the full trip, including tolls, will be reimbursed by the Association at the current IRS rate. Calculation of mileage must be from either home or institution, whichever is closer to the destination. Expense forms must be submitted to the Committee Chair in December and June for the prior 6 months.

**8.24 Pre-approved Allowable Expenses for Officers**

The expenses for the following meetings will be at the expense of the Association:

NASFAA Conference	<i>President or designee</i>
EASFAA Conference	<i>President or designee (if not reimbursed by EASFAA) EASFAA Rep (if someone other than President)</i>
NJHESAA SAB Meetings	<i>President or designee</i>
NASFAA Leadership Conference	<i>President-Elect, and one additional attendee at the discretion of the President, Board of Directors and Executive Council. It is recommended that the President reserve two spots for this training as soon as the information comes from NASFAA. Selection of the individuals who will attend can be decided later.</i>
NJACSA Meetings	<i>President, President Elect, or Past President</i>
NJASFAA Conference	<i>Room for President. (NJASFAA does not pay the conference registration fee for any member.)</i>

Other:



For those meetings/conferences where the President or designee is required to represent the Association, and that attendance is approved by the Executive Council, the Association will pay all appropriate expenses.

6/15/11

### **8.25 Vendor Policy - Guidelines for Distribution of Materials at NJASFAA Sponsored Events**

Any vendor who registers for the annual NJASFAA multi-day conference will be charged the exhibitor sponsor fee regardless of their intent or ability to exhibit at the conference (i.e., attend conference as an attendee and not exhibiting) or the use of the NJASFAA website or listserv to advertise product(s) or service(s).

In an effort to ensure fairness to all vendors who support NJASFAA, the following guidelines have been established concerning the distribution of materials and “giveaways” at NJASFAA conferences, meetings, workshops, and training events:

Conferences:

When a vendor room is provided, vendors are invited to purchase vendor space for exhibit and can distribute any and all material, including but not limited to:

Promotion of specific products and services including brochures, applications and other forms, as well as trinkets with nominal value such as pens, pads, toys, etc.

All other NJASFAA sponsored events (training activities, meetings, workshops, etc.):

Vendors will not be permitted to distribute materials to NJASFAA attendees/ registrants without prior approval of the Chair (s) of the Development Committee, including, but not limited to:

Promotional material describing specific products and services, brochures, applications or forms, or trinkets or other premiums.

The exception to this rule: materials such as pens and pads may be distributed at the discretion of the NJASFAA Chair responsible for the event if such materials would be useful in the conduct of the meeting/workshop. In these cases, the vendor must obtain the approval of that Chair before distributing the materials.

Use of Website:

Vendors/exhibitors who register for the annual multi-day conference will be permitted to advertise their product(s) or service(s) on the NJASFAA website and via the NJASFAA Announcements and listserv.

10/17/17

### **8.26 Whistleblower Policy**

The objective of the NJASFAA Whistleblower Policy is to establish a policy for the protection of elected officers, volunteers and members reporting concerns from retaliation, harassment, or adverse consequences related to complaints of organizational wrongdoing.

It is recommended that all members of the Executive Council sign this statement every year. Appendix H has the complete statement which can be printed for signature.

## **Appendix A:**

### **Legal Documents including Incorporation Papers and Trademark Documents:**

Loaded to NJASFAA Website under About NJASFAA → Governing Documents

Paper versions are in the safe and with the PPM Coordinator.

## Appendix B:

### NJASFAA POSITION STATEMENT

#### Financial Aid Planning and Scholarship Search Companies

An important goal of the New Jersey Association of Student Financial Aid Administrators (NJASFAA) is to advise students and their families seeking financial assistance for post-secondary education. NJASFAA members provide *free* services to students on financial aid availability, application and programs.

Financial aid administrators offer their expertise on eligibility and availability of state, federal, and institutional programs. Assistance in the proper and accurate completion of the necessary forms students use to apply for the various aid programs available is provided.

NJASFAA encourages all interested students and their families to first inquire about financial aid programs, eligibility and application procedures through the Financial Aid Office of the post-secondary institution they are interested in attending. NJASFAA members strive to provide accurate and timely professional advice to students free of charge.

NJASFAA acknowledges the growing number of businesses offering financial aid planning and financial aid application assistance. However, given the diversity of services provided by these businesses, NJASFAA members are not in a position to address the legitimacy, reputation, or effectiveness of these companies.

June 1995

To assist you and your family, the following questions have been developed by The Student Advisory Committee of the College Scholarship Service for those students and families considering using the services of a search company:

- If the company suggests that large amounts of aid are not currently being used, how does it document this?
- How many financial aid sources exist in the company's computer file? Does the company maintain its own file of sources or does it use the file of some other company or service?
- Is there a minimum number of sources provided by the company? Do the listings include scholarships, loans, work or contests? Do they include federal and state programs which the student will be considered for through the regular financial aid process?
- How often does the company update its list of aid sources? Does the company confirm these sources exist and that the deadline dates and eligibility criteria are current?
- Can the student apply directly to the aid sources provided by the company? Are there application fees for the sources provided?
- How long will the student have to wait for information?

- What characteristics are used to match students with aid sources?
- How successful have previous clients been in obtaining funds from aid sources identified by the company?
- Will the company refund the program fee if aid sources are incorrectly matched with the student's qualifications, if aid sources no longer exist or fail to reply to the student, or if application deadlines for aid sources have already passed when the information is received?

Answers to these questions should help families in establishing the credibility of a computer search company. There is no guarantee that a student who uses this type of service will actually receive any funds.

## Appendix C:

### Executive Council Calendar of Events

Below is the annual protocol which lists the major activities of the association on a monthly basis.

MAY	Board of Directors Meeting (must take place prior to the New Council Retreat)  Joint meeting of Outgoing and Incoming Executive Councils  <ol style="list-style-type: none"><li>1. Outgoing Committee Chairs pass their documents/calendar/paperwork to in-coming Chairs</li><li>2. Development of annual goals for each committee – Outgoing President and chairs provide information regarding goals and achievements from prior year as well as future ‘wishes’. New President adds his/her ideas.</li><li>3. Committee chair(s) develop goals and reports to Council at June retreat.</li></ol>
JUNE	New Executive Council Retreat  <ol style="list-style-type: none"><li>1. Budget proposals discussed, Council develops balanced budget</li><li>2. Committee goals are discussed and submitted to Council</li><li>3. Conference program should present a tentative 3-day conference program</li><li>4. Training and Development Committee solicits ideas for training events</li></ol>
AUGUST	Regular Executive Council Meeting  <ol style="list-style-type: none"><li>1. Conference update</li><li>2. Discussion of conference</li><li>3. Development Committee reports</li></ol>
SEPTEMBER	Regular Executive Council Meeting  <ol style="list-style-type: none"><li>1. Conference update</li></ol>
OCTOBER	Regular Executive Council Meeting  <ol style="list-style-type: none"><li>1. Development Committee needs to begin solicitation of vendor support for following calendar year</li></ol>
NOVEMBER	Regular Executive Council Meeting  <ol style="list-style-type: none"><li>1. Conference update</li></ol>

- DECEMBER Regular Executive Council Meeting (and holiday luncheon)
1. Conference update
- JANUARY No regular Executive Council Meeting scheduled (can call for meeting if deemed necessary)
1. Mentoring Committee - coordinating new members and activities
  2. Elections Committee - begin work of recruitment of candidates
  3. Solicitation for distinguished service award nominees
  4. Solicitation for Council candidates
  5. Names for plaques/certificates provided to Awards Committee Cahir (need 4 weeks for engraving)
    - a. Committee members to Membership Chair for certificates;
    - b. Scholarship recipients and
    - c. Distinguished Service/President award recipients
  6. Retiree names solicited for recognition
- FEBRUARY Regular Executive Council Meeting
1. Election Ballot mailed prior to Spring conference (check bylaws for timeline)
  2. Scholarship Committee update
  3. Conference update
- MARCH 3-day Conference held - no regular Executive Council Meeting
1. During Business Meeting:
    - a. Committee Reports (select committees)
    - b. Constitution changes (if needed)
    - c. Committee Member Certificates
    - d. Announce Election Results
  2. During Awards Luncheon:
    - a. recognize and remember any NJASFAA member who has retired or passed away, with brief comments of their contributions
    - b. Past President announces Distinguished Service Awards
    - c. Outgoing President presents President's Award(s) and makes short speech, and officially passes the gavel to Incoming President
    - d. Incoming President gives the Outgoing President the Gavel Plaque for year of service

- e. Incoming President presents a gift to the outgoing President in honor of the training and support provided to the President Elect (approximate value \$125)
  - f. Incoming President makes short speech
3. Once election results are announced, the incoming President Elect should select conference chairs for the conference which will occur during their presidency. Those individuals need to be assigned to current committees for the coming year to 'learn the ropes'.
- a. Selection of Fall Conference Site
  - b. Development of tentative program for Fall conference

APRIL

Regular Executive Council Meeting

1. Report from Conference Committee on 3-day conference

4/27/19



## **Appendix D-1:**

### **Treasurer's Annual Calendar of Events**

#### April

1. Reconcile March 31 bank statements and investment account; send copy to Finance Chair.
2. Prepare Spring Conference Treasurer's Report; forward copy to President and Finance Chair and make 300 copies for conference.
3. Maintain registration lists for nametags and meal count.
4. Attend Spring Conference at registration; present report to association.
5. Pay facility rental and meal cost at end of conference; provide tax-exempt statement.
6. Meet with newly-elected Treasurer-Elect.

#### May [with new Treasurer-Elect]

1. Reconcile Spring Conference registrations and accounts receivable; invoice on-site registrants and vendors (if necessary).
2. Reconcile April bank statements; send copy to Finance Chair.
3. Prepare Treasurer's Report for Executive Council meeting.
4. Evaluate following year's Spring Conference facility contract.

#### June [with new Treasurer-Elect]

1. Reconcile May bank statements; send copy to Finance Chair.
2. Prepare Treasurer's Report for Executive Council meeting.
3. Monitor outstanding receivables.
4. Close and reconcile membership listing for year end.
5. Prepare new member listing for new membership year from Spring Conference membership pre-payments.
6. Prepare pro-forma budget for subsequent year and attend Finance Committee meeting.

#### July

1. Reconcile June bank statements and investment account; send copy to Finance Chair.
2. Prepare Treasurer's Report for Executive Council meeting; forward copy to President, Past-President, Finance Chair and Past-Finance Chair.
3. Prepare budget for consideration and vote by Executive Council.
4. In conjunction with Development Committee, review sponsor/vendor pledges and invoice.

#### August

1. Reconcile July bank statements; send copy to Finance Chair.
2. Prepare Treasurer's Report for Executive Council meeting.

#### September

1. Reconcile August bank statements; send copy to Finance Chair.
2. Prepare Treasurer's Report for Executive Council meeting.
3. Assist in planning for Fall Conference registration mailing.
4. With previous year Treasurer, contact association's CPA for appointment to prepare annual

Form 990 tax returns due November 15 for the year-ended May 31.

#### October

1. Reconcile September bank statements and investment account; send copy to Finance Chair.
2. Prepare Treasurer's Report for Executive Council meeting; forward copy to President and Finance Chair.
3. Process Fall Conference registration receipts. Monitor full and 1-day registrations and meal selections.
4. Coordinate number of registrations with Conference Committee designee to ensure contracted room block gets filled.
5. Peak cash period -evaluate checking, savings and investment accounts, transfer accordingly to maximize interest and dividends.
6. Complete filing of Form 990 Federal tax return. Send copy to all prior-year officers named in the return and past-Finance Chair.

#### November

1. Reconcile October bank statements; send copy to Finance Chair.
2. Prepare Fall Conference Treasurer's Report; forward copy to President and Finance Chair and make 350 copies for conference.
3. Maintain registration lists for registrants, guest speakers, complimentary rooms, and registrant nametags, with meal count by function.
4. Attend Fall Conference at registration; present Report to association.
5. Assist prior-year Finance Chair with year-end Income Statement. Finance Chair will present results at Fall Conference.
6. Review meal charges and other bills/charges during at conference; provide tax-exempt statement where necessary.
7. Invoice on-site registrants and vendors, if any. Follow up on all receivables: membership, conference registration.

#### December

1. Reconcile April bank statements; send copy to Finance Chair.
2. Prepare Treasurer's Report for Executive Council meeting.
3. Evaluate following year's Fall Conference contract.
4. Prepare member roster for Membership Chair; reconcile in anticipation of Membership Directory in January.
5. Carefully review Fall Conference hotel charges and process payment.
6. Evaluate cash position; transfer from savings to checking may be necessary to pay hotel and other conference-related expenses.

#### January

1. Reconcile December bank statements and investment account; send copy to Finance Chair.
2. Prepare Treasurer's Report for Executive Council meeting.
3. Follow-up on Fall Conference receivables; second notice invoices.
4. Provide updated member listing for Directory mailing.

## February

1. Reconcile January bank statements; send copy to Finance Chair.
2. Prepare Treasurer's Report for Executive Council meeting.
3. Assist in planning for Spring Conference registration mailing.
4. Renew liability insurance policy and fidelity bond policy with underwriter.

## March

1. Reconcile February bank statements; send copy to Finance Chair.
2. Prepare Treasurer's Report for Executive Council meeting.

## Appendix D-2

### Treasurer's Procedures

#### Accounts Receivable (*When you receive a check*):

1. **QuickBooks** - <http://quickbooks.intuit.com/>
  - A. **Sign in** using Email address/password
  - B. **Review** bank entries downloaded from Wells Fargo
    - a. For each transaction downloaded, and entry will have to be made into QuickBooks
    - b. Make a note of the date of the transaction at this is the date you will use to make the entry into QuickBooks
  - C. **Click on** the  sign, the Create box will open, and on far right under “**Other**”, click on Bank Deposit
  - D. The **top left account** should say **Wells Fargo Checking**
  - E. **Date:** The date you are depositing the checks into the bank
  - F. **Received from:** Institution or person (member or vendor)
    - a. -If the person or vendor does not exist, add them. Member is for a person, Vendor is for a school/business.
  - G. **Account:** i.e. Member Dues. Confirm the selection chosen indicates “**Income**” in italics and not “Expenses”.
  - H. **Description:** Type in the first initial and last name of the person or vendor for whom the account will be credited, i.e. A. Velez (even if it came from the school)
    - a. If there is a corresponding invoice from NJASFAA.org, enter that number next to the person/vendor's name
  - I. **Payment method:** Check or credit card
  - J. **Ref No:** type the check number or confirmation code
  - K. **Amount:** Enter the amount of the check that is to be applied to that account
  - L. **Class:** Leave blank
  - M. **Scan** a copy of the invoice, deposit slip and check or statement form NMI into QuickBooks

#### Save and New

All deposit slips should match the deposit page in QuickBooks. Do a separate Bank Deposit in Quick books for each separate deposit slip.

#### When one check pays for multiple things

For example: A Member sends in a payment to cover membership and conference in one check for \$140. \$40 is to be paid towards membership dues, and \$100 for the spring conference fee. Two line items must be created for each account, one for membership, one for fall conference with the respective costs. Keep the same check # for each transaction.

#### Example:

1. Received From: ABC College Account: 15-16 Membership Dues Description J. Smith  
Payment Method: Check Ref #: 1234 (check #) Amount: \$40
2. Received From: ABC College Account: 16 Spring Conference Description J. Smith  
Payment Method: Check Ref #: 1234 (check #) Amount: \$100

### **When one school pays for multiple people for the same thing**

Example: College XYZ pays for 15 people's membership dues. It's one line item with account membership and list all the people in the memo.

Example: Received From: XYZ College Account: 15-16 Membership Dues Description J. Smith B. Dole A. Jones D. White F. Williams Payment Method: Check Ref #: 1234 (check #) Amount: \$200

### **When one school pays for multiple people for multiple things**

Break out all the memberships together on one line, all the conferences on one line.

**\*\*Double check the total amount posted in QuickBooks to the total amount on the deposit slip(s) and the total number of checks\*\***

### **NJASFAA invoice receipt paper**

- A. On the membership invoice copy make sure to post the same date in QuickBooks to match the actual date of bank to deposit
- B. Post check number, payment amount and date, and indicate if check is from a person or organization. Write down other members that the check paid for in the appropriate section.
- C. On the check- stamp the back of it.

\*Tip- paperclip all the same invoices together that are on the same depositing slip. Attach the receipt from the bank to this stack of invoices.

## **2. NJASFAA Website (Memberclicks) - [www.njasfaa.org](http://www.njasfaa.org)**

About NJASFAA tab -> Leadership -> Administrative Options -> Payment/Finance

- Payment administrator
- Payments due

**After logging the information in QuickBooks, select the event/item that you want.**

- A. When a person signs up for an event and has an unpaid membership charge, their name will appear under that event as **Payment Due**. The membership fees and conference fees will be combined.
- B. When a person registers for membership and a conference separately, the conference and the membership invoices will appear under two individual **Payment Due** categories.
- C. If, a person registers for a training event, but were never a registered member, his or her membership dues will appear under the specific training event in the **Payment Due** category, ie 2015-16 Verification.
- D. Vendor payments (not for their membership or conference registration) are located in the Vendor/Sponsor Payment Only

Once in the list of payments due, locate the person you want

- click on the box under Paid of the person you want
- invoice number: if you click on it, you can print the invoice that the member received.
- person's name: if you click on their name, an email will pop up to mail them a reminder that payment is due. If you ever want to send payment reminders, you have to do this individually. Emails can be edited specifically per person, be sure to include your contact information so the member knows where to send the check.
- Today's Payment: if the person did not submit the full payment listed, edit it to the amount of the check you received
- Payment Method: cash or check
- Check #- input the check #
- Payment type- Institution or Personal
- Memo- leave blank

Click record payments when done. You can check multiple people at once, or do it individually. Once Record Payments is clicked, this will automatically send an email receipt to the member  
\*\*Payments Recorded- shows a list of all people who have paid for the event/membership

***Tip: At Conferences:***

*Have two windows open: one of payments due, one of payments recorded. Toggle between the two to see if the person has paid or not*

**Accounts Payable**

**When you have to pay a bill electronically:**

The preferred method of paying bills is electronic. Checks are then sent from Wells Fargo to payee within 5-7 business days. You will receive an email when the payment is sent.

**1. Wells Fargo - [www.wellsfargo.com](http://www.wellsfargo.com)**

- A. Click on pay bills with bill pay under Payments on left sidebar
- B. Locate the payee you want to pay. You can click on the person's name to double check that the address is still the same.
- C. Type in the amount of the bill
- D. Click Continue
- E. Memo/Invoice #- the reason for why you're paying them. Monthly service maintenance June (for example)
- F. Click Submit Payments

\*\*Write down the Confirmation number!!!

**2. QuickBooks**

- A. Click on + sign
- B. Only enter checks when they are listed on the banking tab and use the date that was downloaded by Wells Fargo
- C. Under Vendors- Use Check not Expense!

- D. Type in the top box the name of who you're writing the check for
- E. It should be paid out of Wells Fargo Checking Account- The budget item you want the expense to be paid out of. Example Spring 15 Conference. Tip: it will say "Expense" in italics to make sure you have the correct item.
- F. Description- what the check is paying for. Example: February Website Maintenance
- G. Amount- the amount you paid
- H. Member and Class are left blank.
- I. Check no. (the check confirmation from Wells Fargo)
- J. Save and New

### 3. Expenditures Form

All committee members must submit an expenditure authorization form if they want you to write a check to pay a bill or reimburse someone.

To direct people to an expenditure authorization form:

[www.njasfaa.org](http://www.njasfaa.org) Member Center- communication-online forms-expenditure authorization form. They must send you a completed form via print or scan/email. By clicking submit does not send the form to you.

On the expenditure form:

- A. Check # is the confirmation number
- B. Date: the date you submit the e-payment
- C. Initials- your initials
- D. Account: The expense budget item (committee) that you want to assign this expense to (example: conference, website, etc)

#### *When you have to write a paper check*

Log in the checkbook the amount, payee, and committee that the funds should be assigned to. Log it in Quickbooks the same as an electronic check, noting the check number is the check number on the check

Complete the expenditure authorization form if applicable

#### Reports

Balance Sheet and Budget vs Actual should be prepared to be distributed at all Executive Council meetings and uploaded to the NJASFAA website once it has passed.

##### 1. Balance Sheet

**Transaction Date:**

**Export** it to Excel to print for all exec council members

**Save it.**

##### 2. Budget vs Actual-

**Transaction date:**

**From:**  **To:** Fiscal year to date.  
**Accounting Method:**



**Rows Columns:**  with budgeted items

**Run Report** and **Export** report to Excel format. Print copies for all exec council members.

**Save it.**

### 3. Transaction Detail by Date- search for it in reports

Print one copy to bring to the executive council meeting

### **Reconciliation**

- A. On Quickbooks- under Bank Accounts, click on Wells Fargo Checking (or Savings)
- B. Click Match if there's a clean match between what's listed in Wells Fargo vs Quickbooks
- C. If you need to add something from Wells Fargo that is not in Quickbooks, add it as a Vendor- Expense

### **How to create updated Budget vs Actual P&L for new fiscal year**

- A. Once the budget from the upcoming fiscal year has been approved at the Executive Council retreat, you have to update Quickbooks so that a new fiscal year report may be run.
- B. To add new line items, click on the gears icon with NJASFAA- Chart of Accounts
- C. To update the P&L- click on gears icon with NJASFAA- Budgeting
- D. Update the budget numbers to the new numbers under the new fiscal year P&L. Type the full amount for the year in July and click Save and Next. If an item is no longer required; click clear and save and next.

### **Other useful things to know and tips**

- Wells Fargo is open until 6:00pm on Thursdays and Fridays.
- Pay bills immediately
- Set aside one day a week to process all the deposits. During peak times it can be more
- Have all checks deposited before the conference for the most up-to-date list of who has paid/not paid as well as before exec council meetings
- Always keep a stack of deposit slips
- Always bring the checkbook to conferences
- Members can always attend conferences even if the "check is in the mail"
- If a person wants to cancel their registration for a conference before the conference date, instruct them to log back into NJASFAA to edit their registration



## **Appendix D-3:**

### **Letters for Donation Activity:**

**D-1 (a): Letter acknowledging donation with money**

**D-1 (b): Letter acknowledging donation with goods**



Date

Name  
Address  
Address

Dear Name:

On behalf of the New Jersey Association of Student Financial Aid Administrators (NJASFAA), I want to thank you for your generous donation.

Sincerely,

AnnMarie Bouse  
2020-21 NJASFAA Treasurer

---

**Donation Receipt**

Organization: NJASFAA  
Date Received: XX/XX/201X  
Cash Contribution: \$XXX  
Item Contribution: None

*NJASFAA is recognized as a non-profit organization by the IRS as a 501(c)(3) organization, Taxpayer ID# 22-2615338. No goods or services were provided in exchange for your contribution.*



New Jersey Association of Student  
Financial Aid Administrators, Inc.

Date

Name  
Address  
Address

Dear Name:

Thank you for your donation to NJASFAA's \_\_\_\_\_ at our annual 201X  
Conference. This is your official record of your donation.

Organization:	NJASFAA
Date Received:	XX/XX/201X
Value of Contribution:	\$ xxxx

Sincerely,

AnnMarie Bouse  
2020-21 NJASFAA Treasurer

---

**Donation Receipt**

*NJASFAA is recognized as a non-profit organization by the IRS as a 501(c)(3) organization, Taxpayer ID# 22-2615338.*

## **Appendix E:**

### **Election Procedures and Master Calendar**

#### **Procedure Summary:**

NJASFAA elections are conducted in early spring of each calendar year prior to the Spring Conference. The sitting Past President serves as Chair of the Nominations and Elections Committee, and relies on the membership of the Board of Directors and the current Executive Council for assistance in garnering nominations from the membership.

#### **Master Calendar:**

December 15 – The Past President sends an email to membership via the NJASFAA list announcing the call for nominations for the following offices: President-Elect (1), Vice-President (1), Secretary (1), Treasurer-Elect (1), Council Member at Large (4), and the NJASFAA Service Awards (2). Effort must be made to ensure that all positions have a candidate to eliminate double positions in the event of a resignation.

January 15 – nominations of candidates are due via email to the Past President. Nominations for service awards are also due.

February 1 – Past President sends the content of the ballot including names of candidates and college to Technology Chair(s) who set up the ballot using the prior year ballot as a template.

Technology responds via email to the Past President with a link to the test ballot. Past President tests the ballot by casting a vote. If any changes are to be made to the content of the ballot, the Past President communicates these changes back to the committee. Once all changes are satisfied, the ballot is posted to NJASFAA web-site by mid-February. Past President is given a URL to the voting results so that a daily tally can be viewed to see how many members are voting.

February 15 – ballot posted to NJASFAA web-site with voting open until first week of March.

February 15 – A small committee of Past-Presidents will convene to select the NJASFAA Service Awards. At least one member of the committee will be a currently active Past-President. A discussion and vote on the nominees will be done via conference call.

Early March – deadline date for voting. Past President checks final vote count on web site. Record of the results will be noted by the Past-President. The ballots will be purged when the new Council take office.

Mid-March – NJASFAA Spring Conference held, newly elected officers announced, NJASFAA Service Awards announced, President's Awards and Committee Awards announced.

**Dates are subject to actual date of annual Spring Conference and may be revised accordingly.**

As NJASFAA has a strong desire to promote and encourage member participation, any person who agrees to run for office and is not elected will be considered for a Chair or Co-chair position on a working committee.

## **Appendix F:**

### **Membership Committee Annual Calendar of Activities**

February/March:

1. Collect committee membership lists for the creation of recognition certificates.
2. Send membership list in Excel format to Award Chair for determination of the Longevity Awards.

March/April:

1. Produce certificates for President to distribute at the NJASFAA Spring Conference.
2. Get an updated list of active/associate members from the Treasurer after the Spring Conference. Enter updated membership information into the database.

May/June:

1. Send membership applications to all individuals listed in the database who did not pay their annual dues and/or update their membership information for the new year.
2. Complete Data Confirmation Reports should be submitted to the Membership Chair who will update the membership records

October:

1. Survey those individuals who did not renew their membership for the prior year.

November-March:

1. Get monthly updates on active/associate members from the Treasurer and update membership records in the database

## **Appendix G:**

### **Conference Guidelines**

Designing a successful semi-annual conference does not just happen. It is the result of good organization and planning, lots of individual effort and teamwork. These ideas are a starting point for the team that must plan and develop the conference.

#### ***Site Selection***

1. Location
  - a) Accessibility
  - b) Weather
  - c) Points of Interest
  
2. Facility
  - a) Reasonable costs (room and meals)
  - b) Adequate number of rooms/overflow available
  - c) Vendor space
  - d) Conference rooms satisfactory ( size/number)
  - e) Banquet facilities size and menu variety
  - l) Recreation
  - g) General layout favorable, clean and attractive
  
3. Hotel Personnel
  - a) Friendly and cooperative staff
  - b) Sales staff member assigned to assist committee
  
4. Costs
  - a) Rooms-single and double
  - b) Meals and breaks
  - c) Meeting rooms
  - d) Exhibit area set-up
  - e) "Extra" charges such as: gratuities, audiovisual equipment, electricity
  - f) Hospitality hours
  
5. Contract
  - a) Negotiation items
    - i) Costs: guest rooms, meals, meeting rooms, etc.
    - ii) Gratis items: comp rooms per number booked, etc.
    - iii) Extras: check-in and check-out times, meetings, transportation, etc.

#### ***Selecting Committee Members***

1. Recruitment
  - a) Selecting key people by talent, energy, and follow through ability
  - b) Getting newer members involved.

2. Committee Structure
  - a) Conference Co-Chairs
  - b) Subcommittees: The Chair should have a second in charge to take over if the Chair is unable to complete.
  - c) Other volunteers.

### ***Setting Themes, Agendas, and Timetables***

1. Themes
  - a) Current events
  - b) Anniversaries
2. Agendas
  - a) Formal or informal poll of membership
  - b) Ideas from other conferences
  - c) Previous conference committees
  - d) Evaluations of previous conferences
  - e) Current issues/events
3. Timetables
  - a) Set conference date and work backwards
  - b) Murphy's Law: "Everything takes longer than you think".
  - c) "If everything is on schedule for a conference, a key committee member will go on vacation or get sick."
  - d) "When everything is ahead of schedule, the printer's shop will burn down."

### ***Charity Selection***

During each multi-day conference, we typically hold a Tricky Tray and/or 50/50 event. The funds raised from this/these events are offered to a charity that is selected by the Conference Committee. Past practice has been to select an organization in the area of the conference location. Effective with the 2018 Conference, it was decided to donate these funds to a food pantry located on one of the NJASFAA member campuses. The recipient was randomly pulled from all the entries (campus must send a representative to the conference to collect the donation at the Business Meeting).

### ***Budgets***

1. Bottom line: profit or break even?
2. Projected budget
  - a) Estimate attendance based on previous conferences and current location in determining costs.
  - b) Budgeted amounts-entertainment, printing, speakers, reasonable, realistic.
  - c) Fluctuating amounts registration fees, meals, breaks, vendor support.

3. Budget control
  - a) It is necessary that the co-chairs continuously monitor income initiatives and expenditures to stay on-track with the budget.
4. Vendor/Sponsor Support
  - a) It is essential that a significant effort is made to raise funds from vendors and sponsors to help reduce the conference production costs to the membership.

### ***Conference Planning Committee/Proposed Sub-Committees***

1. Program Committee Co-Chairs
  - a) Overall planning coordination
  - b) Coordinate other sub-committees
  - c) Develop of goals and objectives
  - d) Plan time line
  - e) Budget development
  - f) Follow-up with committee
  - g) Progress reports to NJASFAA
  - h) Final reports and accounting
2. Site Committee
  - a) Coordinate conference planning with hotel management
  - b) Coordinate conference planning with local Chamber of Commerce (other activities?)
  - c) Hotel meeting room arrangements
  - d) Hotel food arrangements, coffee breaks, etc.
  - e) Coordinate promotional material with publicity committee
  - f) Arrange hotel room for special guests and speakers
  - g) Arrange set up of exhibit areas
  - h) Prepare "bulletin board" for local menus, places of interest, city map, community activities, etc.
3. Registration Committee
  - a) Develop and mail all conference registration materials
  - b) Staff and operate registration table
  - c) Develop pre-registration materials
  - d) Conduct pre-registration
  - e) Conduct on-site registration
  - f) Provide for registration accounting
  - g) Provide list of registrants for attendees
  - h) Coordinate receipt collection with NJASFAA Treasurer



4. Promotion Committee

- a) Plan and develop all promotional materials (coordinate with site coordinator).
  - i) Recommend letters to NASFAA and EASFAA Presidents
- b) Develop promotional articles for the web-site.
- c) Conduct pre-conference direct mailing (requires coordination with registration committee).
- d) Design and prepare signs for conference sessions (coordinate with program coordinator).
- e) Design and print signs for sponsors and vendors (coordinate with vendor and sponsor committees).
- f) Design and print final conference agenda (coordinate with program committee).

5. Program Committee

- a) Solicit ideas for programs.
- b) Identify key issues and topics to be addressed.
- c) Finalize conference program.
- d) Identify, select and invite major speakers and presenters.
- e) Obtain session moderators.  
Finalize speakers, presenters, and moderators.
- f) Coordinate with NJASFAA Training Committee.
- g) Coordinate speakers' facilities or equipment needs with the Site Committee.
- h) Coordinate free hotel rooms for speakers with the Site Committee.
- i) Prepare session and conference evaluations.
- j) Send thank-you's to presenters, speakers and moderators.

***Head Tables***

- a) Fall Conference –

If there is a keynote speaker for lunch and/or dinner, the head table consists of the Guest Speaker, current President, committee chair who may have arranged for speaker and all elected members of Executive Council (as fits at table).

- b) Spring Conference –

There is always a head table on a dais. Seated at the table are the elected members of the outgoing Executive Council and the President Elect succeeding to the Presidency. The Scholarship recipients, their guests and their sponsors may be seated near the dais at two or three reserved tables.

In both cases, other distinguished individual(s) may be invited to sit at the head table as space allows.

***Retiree Member Fees***

For any Retiree Member who wants to attend a conference, the registration fee for that member will be equal to the published cost of meals for a guest.

## **Appendix H:**

### **NJASFAA Event Conduct Policy**

#### **Purpose**

NJASFAA is committed to providing a safe, productive and harassment-free environment at its conferences, trainings, board and committee meetings, and other NJASFAA-sponsored events. NJASFAA prohibits harassment or discrimination based on race, religion, gender, sexual orientation, gender identity, gender expression, disability, ethnicity, national origin, or other protected status. It also prohibits sexual harassment or intimidation, including unwelcome sexual attention, stalking (physical or virtual), or unsolicited physical contact; and threatening behavior. NJASFAA reserves the right to take an action on other inappropriate disruptions not listed above.

#### **Expectations**

We request that all event participants:

- Be polite, considerate, inclusive, and respectful.
- Avoid using derogatory, discriminatory, non-inclusive language.

These conduct rules apply to all attendees and participants at any NJASFAA-sponsored in-person or online event. Any violations should be reported immediately as outlined below.

#### **Violations to the Policy**

Upon request from NJASFAA, attendees are expected to cease unacceptable behavior. NJASFAA reserves the right to remove any individual from attendance or other participation in any NJASFAA-sponsored in-person or online event without prior warning or refund for the event or membership dues, and to take additional action as deemed necessary, ranging from issuing a warning to permanent suspension of NJASFAA membership.

#### **Reporting Policy Violations**

Violations of this policy should be reported immediately to a member of the NJASFAA Executive Council or the Committee Chairs at an in-person event or by emailing [president@njasfaa.org](mailto:president@njasfaa.org). We also expect event participants to alert staff or security of any dangerous situations, or of any person in distress.

*09/24/2021*

## **Appendix I:**

### **NJASFAA Whistleblower Policy**

The objective of the NJASFAA Whistleblower Policy is to establish a policy for the protection of elected officers, volunteers and members reporting concerns from retaliation, harassment, or adverse consequences related to complaints of organizational wrongdoing.

NJASFAA encourages elected officers, volunteers and members to observe high standards of business and personal ethics in the conduct of their duties and responsibilities. All representatives of NJASFAA should practice honesty and integrity in fulfilling their responsibilities and comply with all applicable laws and regulations.

If an elected officer, volunteer or member reasonable believes that some policy, practice, or activity of NJASFAA is in violation of law, a written complaint may be filed with the NJASFAA President or Chairperson of the NJASFAA Board of Directors.

This Whistleblower Policy is intended to encourage and enable elected officers, volunteers and members to raise concerns within the organization for investigation and appropriate action. With this goal in mind, no elected officer, volunteer or member, who in good faith, reports a concern shall be subject to retaliation. Moreover, an elected officer or volunteer who retaliates against someone who has reported a concern in good faith is subject to discipline up to and including dismissal from the volunteer or elected position.

Reports on concerns shall be kept confidential to the extent practical, consistent with the need to conduct an adequate investigation. Disclosure of reports of concerns to individuals not involved in the investigation will be viewed as a serious offense and may result in dismissal from volunteer/elected position.

#### Statement of Understanding

**I have read and understand the NJASFAA whistleblower policy.**

Name: \_\_\_\_\_

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

## Appendix J:

### Maintaining the Membership Database

NJASFAA uses its web-site to store membership data.

TITLE: Below are the most commonly used titles and should be used whenever possible:

Director of Financial Aid	Financial Aid Counselor
EOF Director	Financial Aid Assistant
Executive Director	Financial Aid Officer
Financial Aid Administrator	Fiscal Officer
Associate Director of Financial Aid	Controller
Assistant Director of Financial Aid	Bursar
Senior Financial Aid Officer	Vice President
Manager	

TYPE: Below are the institutional type designations:

Consultant	Proprietary
Government Agency	Proprietary .degree granting
Graduate/Professional	Public .2 yr.
Guarantee Agency	Public .4 yr.
Lender	Public .research
Other	Servicer
Private	Vendor

## Appendix K:

### ANNUAL REGISTERS

#### K-1: NJASFAA PRESIDENTS

<u>YEAR</u>	<u>President</u>
1968-1969	Alphonso Rylko (d.)
1968-1970	Alphonso Rylko (d.)
1968-1971	Thomas Wadlington (d.)
1971-1972	Thomas Wadlington (d.), Jay Petersen (succeeded)
1972-1973	Jay Petersen (d.)
1973-1974	Jay Petersen (d.)
1974-1975	William Murphy (d.)
1975-1976	William Murphy (d.)
1976-1977	Robert J. Chonko
1977-1978	Robert J. Chonko
1979-1980	Sister Ann Michele Texido(d.)
1979-1981	Sister Ann Michele Texido(d.)
1980-1981	Jennifer Dowd
1968-1972	Arthur Richmond (d.)
1982-1983	John Fisher
1968-1973	Carol Pagano (d.)
1984-1985	Shirley Jackson
1985-1986	Jesse Jackson
1986-1987	Mary Hurdle (d.)
1987-1988	Cheryl White
1988-1989	Francine Andrea
1989-1990	Richard Woodland
1990-1991	Emmett Bivins
1991-1992	Catherine M. Boscher-Murphy
1992-1993	Paul J. Gilroy
1993-1994	Michael J. Bennett
1994-1995	Matthew Spina
1995-1996	Kathy Bialk
1996-1997	Sheila Attias
1997-1998	Joyce Farmer
1998-1999	Moshe Weisberg
1999-2000	Eric Locklear; Karen Struthers (succeeded)
2000-2001	Karen Struthers
2001-2002	Audrey Loera
2002-2003	Susan Barschow, David Sheridan (succeeded)
2003-2004	David Sheridan
2004-2005	Maribeth Quinn
2005-2006	Carmen Panlilio
2006-2007	Helen Mikulak

2007-2008	Gisele Joachim
2008-2009	Debra Wulff
2009-2010	Evelynne Blatt
2010-2011	Ninfa Mueller
2011-2012	Stacy Salinas
2012-2013	Karen Sokol
2013-2014	Douglas Wilson
2014-2015	Jim Anderson
2015-2016	Cynthia Montalvo
2016-2017	Wil Casaine
2017-2018	Tammi Hussey
2018-2019	Christine Petersen
2019-2020	Michael Livio
2020-2021	Asia Taj
2021-2022	Lucy Candal-Fernandez

## K-2: Executive Council Register

Year	President	Vice President	President Elect	Treasurer	Secretary	Past President	Councilperson At Large
1968-69 1969-70	Alphonso Rylko(d)	Thomas Wadlington	N/A	Jay Petersen	Jay Petersen	N/A	N/A
1970-71 1971-72	Thomas Wadlington(d) Jay Petersen (suc.)	Jay Petersen	N/A			Alphonso Rylko	N/A
1972-73 1973-74	Jay Petersen(d)	William Murphy	N/A	Harry Ash		N/A	N/A
1974-75 1975-76	William Murphy(d)	Robert Chonko	N/A			Jay Petersen	N/A
1976-77 1977-78	Robert Chonko	Sr. Ann Michele Texido	N/A	Jennifer Dowd	Carol Rinehart	William Murphy	Jennifer Crewes Willie Moss Arthur Richmond Thomas Scott – EASFAA Rep
1978-79 1979-80	Sr. Ann Michele Texido(d)	Jennifer Dowd	N/A	Patricia Byron	Judy Maloney	Robert Chonko	Mel Brown Carol Pagano Fred Hertrich Tom Scott (N) Betty Ehgott (C) Frank Daniels (S) <sup>1</sup>
1980-81	Jennifer Dowd	Arthur Richmond	N/A	Patricia Byron	Jeanne Sparacino	Sr. Ann Michele Texido	Shirley Jackson Carol Pagano Tom Scott
1981-82	Arthur Richmond(d)	John Fisher	N/A	Natalie Davis	Elaine Green	Jennifer Dowd	Patricia Byron Carol Pagano William Swift
1982-83	John Fisher	Carol Pagano	N/A	Natalie Davis	Sr. Ann Michele Texido	Arthur Richmond	Shirley Jackson Robert McBride Paula Wristen
1983-84	Carol Pagano(d)	Shirley Jackson	N/A	Janet Mariano	Paula Wristen	John Fisher	Rob Baumel Jesse Jackson Robert McBride Pamela Maynard
1984-85	Shirley Jackson	Jesse Jackson	N/A	Janet Mariano	Cheryl White	Carol Pagano	Mel Brown Helena Myers Ector Quiles Jane Tillis

<sup>1</sup> Council members at Large included three regular and three regional chairs (Northern, Central, and Southern)



Year	President	Vice-President	President-Elect	Treasurer	Secretary	Past-President	Councilperson At Large
1985-86	Jesse Jackson	Mary Hurdle	N/A	Ector Quiles	Cheryl White	Shirley Jackson	Janet Mariano Michael Menendez Pamela Maynard Kathy Rachel
1986-87	Mary Hurdle(d)	Cheryl White	N/A	Francine Andrea	Marion Twitchell	Jesse Jackson	Michael Bennett Janet Mariano John Melendez Michael Menendez
1987-88	Cheryl White	Jeanne Lewis	Francine Andrea	Aileen Walter	Mary Stack	Mary Hurdle	Lissa Anderson Emmett Bivins Diane Pienta Matthew Spina
1988-89	Francine Andrea	Joseph Roberto	Richard Woodland	Aileen Walter	Maria Pappateno	Cheryl White	Lissa Anderson Emmett Bivins Janet Mariano Moshe Weisberg
1989-90	Richard Woodland	Joseph Roberto	Emmett Bivins	Vera Petrow	Maria Pappateno	Francine Andrea	Lissa Anderson Catherine Boscher-Murphy Charlene Roper-Stinson Luis Tavarez
1990-91	Emmett Bivins	Joann Craig	Catherine Boscher-Murphy	Vera Petrow	Sheila Schwartz	Richard Woodland	Mel Brown Cheryl White Joseph Roberto Reginald Page
1991-92	Catherine Boscher-Murphy	Peg Murnane	Paul Gilroy	Lissa Anderson	Sheila Schwartz	Emmett Bivins	JoAnn Craig Reginald Page Joseph Roberto Matthew Spina
1992-93	Paul Gilroy	Ninfa Mueller	Michael Bennett	Jeanne Bowen	Latonya Cargile	Catherine Boscher-Murphy	JoAnn Craig Peg Murnane Reginald Page Joseph Roberto
1993-94	Michael Bennett	Robert Baylor	Matthew Spina	Reginald Page	Mary Ellen Mathias	Paul Gilroy	JoAnn Craig Elaine Green Joseph Roberto Moshe Weisberg
1994-95	Matthew Spina	Gloria Green	Kathy Bialk	Larry Eadie	Mary Ellen Jenkins	Michael Bennett	Lissa Anderson Ninfa Mueller Reginald Page James Pegg

Year	President	Vice-President	President-Elect	Treasurer	Secretary	Past-President	Councilperson At Large
1995-96	Kathy Bialk	Thomas Holmes	Sheila Attias	Larry Eadie	Susan Barschow	Matthew Spina	Lissa Anderson Keith Green James Pegg Sharon Wedington
1996-97	Sheila Attias	Larry Eadie	Joyce Farmer	Mary Ellen Duffy	Winifred Still Davis	Kathy Bialk	Norma Betz Gloria Green Keith Green Thomas Holmes
1997-98	Joyce Farmer	Helena Myers	Moshe Weisberg	Keith Green	Winifred Still Davis	Sheila Attias	Carla Bender Norma Betz Gail Scott Bey Larry Eadie
1998-99	Moshe Weisberg	Helena Myers	Eric Locklear	Keith Green	Gisele Joachim	Joyce Farmer	LaTanya Everett Louis Palefsky Winifred Still Davis Debra Wulff
1999-00	Eric Locklear Karen Struthers (succeeded)	Gisele Joachim Helena Myers (succeeded)	Karen Struthers	Marilyn Schearcraft Jennifer Scannell (succeeded)	Audrey Loera	Moshe Weisberg	Norma Betz Dorothy Gilliard Joseph LoSasso Joseph Roberto
2000-01	Karen Struthers	Joseph LoSasso	Audrey Loera	Jennifer Scannell	Mary Deignan	Moshe Weisberg	Lissa Anderson Dorothy Gillman Maribeth Quinn Debra Wulff
2001-02	Audrey Loera	Debra Wulff	Susan Barschow	Helen Mikulak	Dorothy Gillman	Karen Struthers	Lissa Anderson Dorothy Gilliard Joseph Roberto Karen Weber

Year	President	Vice-President	President-Elect	Treasurer	<b>Treasurer-Elect (eff. 7/1/02)</b>	Secretary	Past-President	Councilperson At Large
2002-03	Susan Barschow Dave Sheridan (succeeded)	Maribeth Quinn	David Sheridan	Helen Mikulak	Debra Wulff	Ida Pabon	Audrey Loera	Dorothy Gilliard Jim Owens Joe Roberto Karen Weber
2003-04	Dave Sheridan	Helen Mikulak	Maribeth Quinn	Debra Wulff	Dennis Levy	Karen Weber	Audrey Loera	Frank Cuzzo Jim Owens Carmen Panlilio Karen Sokol
2004-05	Maribeth Quinn	Joe Roberto	Carmen Panlilio	Dennis Levy	Helen Mikulak	Karen Weber	Dave Sheridan	Jean Hathaway Shirley McFarlane Reginald Page Mark Singer
2005-06	Carmen Panlilio	Reginald Page	Joe Roberto	Helen Mikulak	Dennis Levy	Karen Weber	Maribeth Quinn	Lissa Anderson Sharon Austin Jean Hathaway Mark Singer
2006-07	Helen Mikulak	Karen Sokol	Gisele Joachim	Dennis Levy	Adrienne Hynek	Evelynne Blatt	Maribeth Quinn	Sharon Austin Woody Lewis Ninfa Mueller Karen Weber
				<b>Treasurer</b>	<b>Past-Treasurer (eff. 6/1/07)</b>			
2007-08	Gisele Joachim	Woodrow Lewis (resigned)	Debra Wulff	Evelynne Blatt	Adrienne Hynek (resigned)	Karen Weber	Helen Mikulak	Sharon Austin Karen Sokol Jean Hathaway Ninfa Mueller
2008-09	Debra Wulff	Ninfa Mueller	Evelynne Blatt	Karen Sokol	Evelynne Blatt (fulfilling both roles)	Karen Weber	Gisele Joachim	Jim Anderson Jean Hathaway Sharon Lu Jason Taylor Douglas Wilson
2009-10	Evelynne Blatt	Christine Petersen	Ninfa Mueller	Douglas Wilson	Karen Sokol	Sylvia Mendoza Bilquis Zaka (succeeded)	Debra Wulff	Sharon Austin Michael Corso Stacy Salinas Larry Sharp
2010-11	Ninfa Mueller	Jim Anderson	Stacy Salinas	Karen Sokol	Douglas Wilson	Karen Weber	Evelynne Blatt	Sharon Austin Michael Corso Pilar Sanchez Larry Sharp

Year	President	Vice-President	President-Elect	Treasurer	Past- Treasurer	Secretary	Past-President	Councilperson At Large
2011-12	Stacy Salinas	Cynthia Montalvo	Karen Sokol	Doug Wilson	Karen Sokol	Evelynne Blatt	Ninfa Mueller	Sharon Austin Grace Giglio Tammi Hussey Pilar Sanchez
2012-13	Karen Sokol	Patricia Guli	Douglas Wilson	Lucy Candal- Fernandez	Douglas Wilson	Cynthia Montalvo	Stacy Salinas	James Anderson Sharon Austin Tammi Hussey Michael Livio
2013-14	Douglas Wilson	Tammi Hussey	James Anderson	Christine Petersen	Lucy Candal- Fernandez	Joanna Cellery	Karen Sokol	Danielle Barbee Wil Casaine Ed Gonzalez Cynthia Montalvo
2014-15	Jim Anderson	Tammi Hussey	Christine Petersen	Joanna Cellery	Christine Petersen	Asia Taj	Doug Wilson	Javonda Asante Danielle Barbee Wil Casaine Ed Gonzalez
2015-16	Cynthia Montalvo	Wil Casaine	Cynthia Montalvo	Carmen Ferrari	Joanna Cellery	Sherrel Watson-Hall	Jim Anderson	Danielle Barbee Ed Gonzalez Michale Livio Asia Taj
2016-17	Wil Casaine	Michael Livio	Tammi Hussey	Asia Taj	Carmen Ferrari	Sherell Watson-Hall	Cynthia Montalvo	Felicia Bryant Lucy Candal-Fernandez Ed Gonzalez Yato Suzuki
2017-18	Tammi Hussey	Michael Livio	Christine Petersen	Asia Taj	Michael Livio in acting capacity	Kathy Prieto	Wil Casaine	Drew Armondo Lucy Candal-Fernandez Ed Gonzalez Sherrell Watson-Hall
2018-19	Christine Petersen	Sherell Was-ton- Hall	Michael Livio	Melissa Vargas	Asia Taj	Rosemary Guichardo	Tammi Hussey	Javonda Assante Sharon Austin Lucy Candal-Fernandez Nicholas Capodice

Year	President	Vice-President	President-Elect	Treasurer	<b>Treasurer-Elect (eff. 7/1/19)</b>	Secretary	Past-President	Councilperson At Large
2019-20	Michael Livio	Lucy Candal-Fernandez	Asia Taj	Melissa Vargas	AnnMarie Bouse	Rosemary Guichardo	Christine Petersen	Nicholas Capodice Edward Hill Eduardo Gonzalez, Jr. Kathy Prieto
2020-21	Asia Taj	Edward Hill	Lucy Candal-Fernandez	AnnMarie Bouse	Diane Pienta-Lett	Rosemary Guichardo	Michael Livio	Nicholas Capodice Sarah Carrero Alejandro Guiral Michael Murray
2021-22	Lucy Candal-Fernandez	Nicholas Capodice	Ed Hill	Diane Pienta-Lett	Miranda Cole	Rosemary Cuichardo	Asia Taj	JJ Belle AnnMarie Bouse Emily Grant McDevitt Alex Guiral

## **Appendix L:**

### **NJASFAA AWARD Descriptions**

NJASFAA recognizes individuals who have provided service or made significant contributions to the aims and ideals of the financial aid profession. Nominations for all awards are made by the members (active and associate) of NJASFAA and are solicited by the Nominations/Elections Committee. Awards are presented at the Spring Conference, unless otherwise arranged.

#### ***Certificates of Appreciation***

Generally these are given to all Committee Chairs and committee members annually to recognize their efforts throughout the previous year. Certificates are prepared by the Membership Committee.

### **NJASFAA AWARD DESCRIPTIONS**

#### **Distinguished Service Awards:**

##### ***Arthur E. Richmond Distinguished Service Award***

This award is presented to recognize the outstanding contribution of an individual(s) in the field of financial aid who has made significant contributions to the field of financial aid through NJASFAA activities. The recipient(s) has to be a NJASFAA member. Because this award represents the highest honor bestowed by NJASFAA, it is recommended that only one recipient be selected each year; exceptions can be made under unusual circumstances.

*Art Richmond is often referred to as one of the most enthusiastic proponents of NJASFAA. Serving as the Director at Rutgers University and always acting as a student advocate, Art's vision for the financial aid profession was to insure that those entering this profession could learn the trade through the establishment of a statewide organization we now know as NJASFAA. He served as President of NJASFAA twice and conducted many of the sessions that taught financial aid administrators how to examine the different methodologies for computing aid. He stressed both horizontal and vertical packaging to ensure that the neediest students received funds. Art's impact on the financial aid community can be felt even today as we think about his controversial stands on how student dollars are allocated.*

##### ***The Thomas C. Scott Distinguished Service Award***

This award is presented to recognize the outstanding contributions of an individual not directly involved in a Financial Aid Office to the field of financial aid and/or NJASFAA. The recipient does not have to be a NJASFAA member. Because this award represents the highest honor bestowed by NJASFAA, it is recommended that only one recipient be selected each year; exceptions can be made under unusual circumstances.

*Tom Scott was a consummate financial aid professional. Serving as the Director of Financial Aid at St. Peter's College for over 22 years, Tom aspired to serve the financial aid community as a trainer, a mentor, and our resident comedian. He considered his profession his vocation; whether by interpreting regulations, providing expert guidance, or offering assistance and support to all*

*students and administrators, from counseling students on their future objectives to maintaining one's sanity in this hectic business. Tom truly understood what it was to contribute to ones community for the betterment of the individual and the profession as a whole.*

***NOTE: There cannot be a repeat recipient for either of the Distinguished Service Awards if that recipient is still in the same category (e.g. a recipient of the Arthur E. Richmond could later receive the Thomas C. Scott award, but not another Arthur E. Richmond Award).***

### **President's Service Awards:**

#### ***The William G. Murphy President's Award***

The recipient(s) of this award is/are selected by the President to recognize the outstanding contributions of an individual(s) to NJASFAA and the President. The nominee(s) must be a NJASFAA member. There is no restriction as to the number of awards given each year.

*Bill Murphy served as Director of Financial Aid at Glassboro State College, now known as Rowan University. Bill distinguished himself in the financial aid profession by serving as President of NJASFAA, a member of the state college sector, and a community representative to the HESAA board meetings. Bill was an active leader in financial aid technology; often identifying technology issues long before the solutions became available. Those who were close to Bill know of his loyalty, caring and selflessness as a friend. His dry sense of humor and quick wit were always welcome distractions during meetings or conferences. Bill was the consummate professional and a true pioneer in introducing technology to the financial aid workplace.*

### **Lifetime Membership Award:**

*Lifetime Membership Status* will be granted to Past-Presidents at the time of their leaving the Association (typically due to retirement). It is recommended that the recipient be either out of the aid profession or out of the NJ area. The recipient of this award will remain an Associate member of NJASFAA and will be entitled to all benefits accorded an Associate member. Any member of the Board of Directors who falls into this category is entitled to an engraved watch (engraving to be simple – e.g. NJASFAA or NJASFAA and the year).

*Lifetime Membership Award* is granted to a NJASFAA member at the time of their leaving the Association (typically due to retirement) at the discretion of the President. This designation tends to be used for active members who may not have served as President.

### **Other Awards:**

#### ***Committee of the Year Award***

The recipient committee of this award is selected by the President to recognize the outstanding contribution(s) made to NJASFAA by a specific committee. A plaque is presented to the chair(s), certificates to the members.

### ***The Young Leader Award***

The recipient of this award is selected by the President to recognize the outstanding contribution to NJASF AA and the financial aid profession by an individual who is advancing within the association. A plaque is presented.

### ***Gavel Plaque***

Presented to the outgoing President by the incoming President.

### ***No longer in Effect (2018/19) - Memorial Scholarship Awards (eff. 5/16)***

Chair is responsible for ensuring the Scholarship winners receive a framed certificate. Each year, the scholarship may include the name of any NJAF AA individual who is being memorialized based on their contributions to NJASF AA and the membership.

### ***Retiree Awards***

Chair is responsible for ensuring that recent or forthcoming retirees are honored with a certificate and retiree pin.

### ***Longevity Awards***

Longevity Awards are given to those members of NJASF AA who reach the 5, 10, 15, 20, 25 and 30 year milestones of service to Financial Aid (service over career, not limited to service in NJ). See Appendix K-3 for additional information.

### ***Gift for outgoing President***

Coordinates the giving of a gift to the outgoing President by the President-Elect.

### ***Other Awards***

Special circumstances may call for the creation of a specific award to recognize a contribution to the association that is not covered by any of the above awards. This action can be taken at the discretion of the President and/or Executive Council. This would be a highly unusual circumstance.

The Board of Directors, with the approval of the Executive Council, is responsible for the establishment and naming of awards for NJASF AA.

4/27/19



## Appendix L –1:

### AWARD RECIPIENT LISTINGS

#### THOMAS C. SCOTT DISTINGUISHED SERVICE AWARD

(Awarded as the Distinguished Service Award prior to 1995)

Awarded annually at the Spring Conference.

YEAR	Recipient	Institution
2021	Tami Gilbeaux	Inceptia,
2020	Jean Hathaway	NJHESAA
2019	David Garelick	Collegiate Productions
2018	Samantha R. Benson	NJHESAA
2017	Pilar Sanchez	NJHESAA
2016	Gabrielle G. Charette	NJHESAA
2015	Edward M. Hill	PNC Education Lending
2014	Glenn Lang	NJ Commission Higher ED
2013	Justin Draeger	NASFAA
2012	Eduardo Gonzalez, Jr.	Sallie Mae
2011	Andre F. Maglione	NJHESAA
2010	Vince Davis	StuFund
2009	Magda Torres	NJHESAA
2008	Jim Anderson	Sallie Mae
	Lissa Anderson	Consultant
2007	Sharon Austin	NJHESAA
2006	Manuel Loera	NJHESAA
2005	Gloria Green	NJHESAA
2004	Sandy Santana	USED - Region II
	Steve Tessitore	USED - Region II
2003	Larry Sharp	NJHESAA
2002	John Iacovelli	NJHESAA
2001	Fran Andrea	NJHESAA
2000	Gisele Joachim	NJHESAA
1999	Kimber Decker	First Union Bank
1998	Scott Freedman	NJOSA
1997	Nina Zachery	NJOSA
1996	Leah Fletcher	NJOSA
	Sherry Fox	NJOSA
	Harold Gorrell	NJOSA
1995	Richard Solomon	Academic Management, Inc.
1994	Marion Twitchell	EDUCAID
1993	Gary Corliss	NJHEAA
1992	Wilma Harris	Chair, SAB
1991	Brett Lief	NJDHE
1990	Chancellor Edward Hollendar	NJDHE
1989	Gene Hawkins	College Board
1988	The Student Assistance Board	SAB
1987	?	

1986  
1985  
1984

?  
Merle Allshouse  
Joseph LoRocco  
Bud Thomas  
Tom Hartigan

Bloomfield College  
NJDHE  
NJDHE  
NJDHE

**ARTHUR E. RICHMOND DISTINGUISHED SERVICE AWARD**

(Awarded as the Distinguished Service Award prior to 1992)

<b>YEAR</b>	<b>Recipient</b>	<b>Institution</b>
2021	Edward Hill	Rider University
2020	Hayato Suzuki	Montclair State University
2019	Asia Taj	New Jersey Institute of Technology
2018	Michael D. Livio	Princeton Theological Seminary
2017	Lucy Candal-Fernandez	Montclair State University
2016	Tammi A. Hussey	Seton Hall University
2015	Danielle Barbee	Rutgers University
2014	Robert Alston (posthumously)	The College of New Jersey
2013	Evelynne Blatt	Centenary College
2012	Douglas Wilson	Rutgers University - Newark
2011	Dorothy J. Gilliard	Lincoln Educational Services
2010	Karen Sokol	Seton Hall School of Law
2009	Lillian Riley	Rutgers University
2008	Maribeth Quinn	Muhlenberg Regional Med. Ctr.
2007	Adrienne Hynek	Stevens Institute of Technology
2006	Helen Mikulak	Somerset County Technical Inst.
2005	Reginald Page	Mercer County College
2004	Catherine M. Boscher-Murphy	cbm enterprises, inc.
2003	David Sheridan	Stevens Institute of Technology
2002	Joseph Roberto	Bergen County Comm. College
2001	Moshe Weisberg	Rabbinical College
2000	Helena Myers	William Paterson University
1999	Michael J. Bennett	Brookdale Community College
1998	James Pegg	Sussex Community College
1997	Rich Woodland	Rutgers University - Camden
1996	JoAnn Craig	Union County College
1995	William Murphy	Rowan College of New Jersey
1994	Peg Murnane	Caldwell College
1993	Matthew Spina	Princeton Theological Seminary
	Elaine Varas	UMDNJ
1992	Cheryl White	UNDNJ
1991	Peg Murnane	Caldwell College
1990	Janet Mariano	Bloomfield College
1989	?	
1988	?	
1987	?	
1986	?	
1985	?	
1984	Robert Chonko	Fairleigh Dickinson University

## WILLIAM G. MURPHY PRESIDENT'S AWARD

YEAR	Recipient	Institution
2021	Catherine M. Boscher-Murphy	Montclair State University
	Tammi Hussey	Seton Hall University
2020	AnnMarie Bouse	Rutgers University
	Christine Petersen	Hudson County Community College
2019	GraceAnn Giglio	Ocean County Vocational Tech. Sch.
	Sylvia Mendoza	Hudson County Community College
2018	Karen Sokol	Seton Hall U. School of Law
2017	Edward M. Hill	PNC Bank Educational Loan Center
2016	Kathy Prieto	Felician College
2015	Evelynne Blatt	Centenary College
	Catherine M. Boscher-Murphy	Montclair State University
	Douglas Wilson	Rutgers University - Newark
2014	Karen Sokol	Seton Hall U. School of Law
2013	Gisele Joachim	Seton Hall U. School of Law
2012	Catherine M. Boscher-Murphy	cbm enterprises, inc.
2011	Moshe Z. Weisberg	Rabbinical College
2010	Maribeth Quinn	Muhlenburg Reg. Med. Ctr.
2009	Ninfa Mueller	Rutgers University
2008	Karen Sokol	Seton Hall U. School of Law
2007	Vince Davis	SallieMae Trust
	Shawn Murphy	Citibank Student Loan Corp.
	Karen Weber	Rutgers University
2006	Michael Bennett	Brookdale Comm. College
	Maribeth Quinn	Muhlenburg Reg. Med. Ctr.
2005	Richard Woodland	Rutgers University - Camden
	Jo-Ann Craig	Rutgers University - NB
2004	Helen Mikulak	Somerset County Vo-Tech
	Michael Bennett	Brookdale Comm. College
2003	Maribeth Quinn	Muhlenberg Reg. Sch. Nurs.
	Debra Wulff	Drew University
2002	Karen Struthers	Seton Hall University
	Joe Roberto	Bergen County Comm. College
2001	Audrey Loera	Raritan Valley Comm. College
2000	Catherine M. Boscher-Murphy	Bloomfield College
	Gisele Joachim	NJHESAA
1999	Helena Myers	William Paterson College
1998	Keith Green	Berkeley College
1997	Keith Green	Berkeley College
1996	Matthew Spina	Princeton Theological Seminary
1995	Elaine Green	Rutgers University
1994	Joe Roberto	Seton Hall University
	Sandra Rollins	UMDNJ
1993	Renee Saleh	NJDHE
1992	Marion Twitchell	EDUCAID
	Fran Andrea	Drew University

1991	Vero Petrow	Trenton State College
1990	Rich Woodland	Rutgers University - Camden
1989	Fran Andrea	Drew University
1988	Helena Myers	William Paterson College
1987	Michael J. Bennett	Brookdale Community College
	Janet Mariano	Bloomfield College
1986	Michael J. Bennett	Brookdale Community College

## **LIFETIME MEMBERSHIP (eff. 2002)**

### *LIFETIME MEMBERSHIP AWARDS:*

Granted to a NJASF AA member at the time of their leaving the Association (typically due to retirement) at the discretion of the President. This designation tends to be used for active members who may not have served as President. A framed certificate is given to the recipient.

<u>YEAR</u>	<u>Recipient</u>	<u>Institution</u>
2011	Sherry Fox	NJHESAA
2006	Jo-Ann Craig	Rutgers University
2005	Marion Twitchell	Educaid
2003	Dick Solomon	Academic Management, Inc.
2002	Scott Freedman	NJHESAA

### *LIFETIME MEMBERSHIP STATUS:*

Granted to Past-Presidents at the time of their leaving the Association (typically due to retirement). It is recommended that the recipient be either out of the aid profession or out of the NJ area. A framed certificate is given to the recipient.

## **LIFETIME MEMBERSHIP STATUS (new 2002)**

<u>YEAR</u>	<u>Recipient</u>	<u>Institution</u>
2020	Matthew Spina	Princeton Theological Seminary
2018	Cheryl White	Rutgers University, New Brunswick
2017	Debra Wulff	Warren County Comm. College
2014	Ninfa Mueller	Rutgers University, New Brunswick
2012	Francine Andrea	HESAA
2011	Helen Mikulak	Somerset County Vo-Tech
2009	Michael Bennett	Brookdale Community College
2007	Richard Woodland	Rutgers University
2006	Sheila Attias Kathy Bialk	Passaic County Comm. College New Jersey Institute of Technology
2002 (retroactive)	Emmett Bivins Jesse Jackson	Ocean County Comm. College Rutgers University

Robert Chonko  
Jennifer Dowd  
John Fisher  
Paul Gilroy  
Mary Hurdle (d)  
Shirley (Jackson) Messenger  
Jay Petersen (d)  
Sr. Ann Michele Texido (d)

Fairleigh Dickinson University  
Middlesex Comm. College  
Bloomfield College  
Rutgers University  
New Jersey Institute of Technology  
Rutgers University  
Rutgers University  
St. Elizabeth's College

## COMMITTEE OF THE YEAR (new 2004)

YEAR	Recipient	Members
2021	<i>Government Relations Committee</i>	
	AnnMarie Bouse, Co-Chair Tami Gilbeaux Emily Grant Heidi Kovalick L. Beth McSweeney	Wil Casaine, Co-Chair Eduardo Gonzalez, Jr. Edward Hill Michael Livio Chandra Sakajani
	<i>Training and Professional Development</i>	
	David Garelick, Co-Chair Cynthia Montalvo, Co-Chair	Tammi Hussey, Co-Chair
2020	<i>Government Relations Committee</i>	
	AnnMarie Bouse, Co-Chair Barbara Berreski Eduardo Gonzalez, Jr. Edward Hill Linethe Letelier Andre Maglione Saswati Roy Joan Shields	Wil Casaine, Co-Chair Tami Gilbeaux Emily Grant Heidi Kovalick Michael Livio Rachel Mecca Chandra Sakajani
	<i>Technology Committee</i>	
	Hayato Suzuki, Chair	
2019	<i>Non-Traditional Education Comm.</i>	
	GraceAnn Giglio, Co-Chair Michelle Burwell Alicia Hughes Tara Murafsky Nicholas Stewart	Alejandro Guiral, Co-Chair Rosibel Gomez Tristia Kayser Greg Stevenson Bilquis Zaka
2018	<i>Public Relations Committee</i>	
	Lucy Candal-Fernandez, Co-Chair	Felicia Bryant, Co-Chair
2017	<i>Conference Committee</i>	
	Edward M. Hill, Co-Chair Hayato Suzuki, Co-Chair Stanley Fils, Co-Chair Danielle A Barbee Samantha R. Benson Georgena R. Brooks Nicholas Capodice Wil P. Casaine	Kelly D. Ceddacci David Garelick Eduardo Gonzalez, Jr. Sharon Lu Cynthia Montalvo Michael Murray Kathy C. Prieto
2016	<i>Government Relations Committee</i>	
	Lucy Candal-Fernandez, Co-Chair Michael Livio, Co-Chair Lissa Anderson Drew Aromondo Marnie Grodman	Andre Mglione Kathy Prieto Breanne Simkin Christine Willse Patrick Ziegler



2015	<i>Government Relations Committee</i> Lucy Candal-Fernandez, Co-Chair Michael Livio, Co-Chair Lissa Anderson Drew Aromondo Gedalya Green	Marnie Grodman Ivon Nunez Shalini Patel Jennifer Short Christine Willse
2014	<i>Training and Professional Development</i> Carmen Ferrari, Co-Chair David Garelick, Co-Chair Lissa B. Anderson Karyn Arnold Thomas Askew Georgena Brooks	Al Dorsett Aisha Hill Arlene Marte Michael Murray Christine Willse
2013	<i>Conference Committee</i> Cynthia Montalvo, Co-Chair Gisele Joachim, Co-Chair Danielle Barbee Grace Ann Giglio Ed Gonzalez, Jr.	Edward Hill Kristen Isaksen Shalini Patel Hayato Suzuki Andrew Toriello
2012	<i>Finance Committee</i> Cynthia Montalvo, Chair Jean Brine Ninfa Mueller	Stacy Salinas Karen Sokol Douglas Wilson
2011	<i>Training and Professional Development</i> Tammi Hyssey, Co-Chair Pilar Sanchez, Co-Chair Karyn Arnold Danielle Barbee Teri Boyle Sharee Brend Vince Davis	Erick Herrera Ed Hill Ninfa Mueller Alisha Pendleton Carolann Pierre-Morgan Joseph Roberto
2010	<i>Conference Committee</i> Stacy Salinas, Co-Chair Ken Jones, Co-Chair Diane Anchundia Nicholas C Capodice Jason O Chavez Vincent R Davis	Eduardo Gonzalez, Jr. Dawn M Grasso Edward M Hill Manuel Loera Susan E Murphy Ruth A. Novello
2009	<i>College Goal Sunday Steering Cmte.</i> Helen Mikulak, Chair Lissa Anderson Fran Andrea Karyn Arnold Sharon Audet Sharon Austin Norma Betz Aquila Galgon Azizah Hammiduh Monique Hutchinson	Betsy Marinace Amy Novosel Ivon Nunez Lillian Riley Joseph Roberto Marion Twitchell Douglas Wilson Debra Wulff Bilquis Zaka

2008	<i>Multi-Cultural Committee</i> Manuel Loera, Chair Marcos Arteaga Danielle Barbee Annmarie Harrison	Ed Hill Cassandra Hunter Teresa Pupo
2007	<i>College Goal Sunday</i> Maribeth Quinn, Chair Lissa Anderson Karyn Arnold Sharon Audet Marguerite Beardsley Aquila Galgon Azizah Hamiduddin Monique Hutchinson Adrienne Hynek	John Iacovelli Cathleen Lewis Joanna Mia Reggie Page Lillian Riley Dave Sheridan Marion Twitchell Debra Wulff
2006	<i>Training Committee</i> Sharon Austin, Co-Chair Jo-Ann Craig, Co-Chair Bob Baylor Chris DeSousa Derek Gatling Pat Guli	Tammi Hussey Pat Medeiros Anthony Pizzuto Digna Solis Julia Torres Linda Tunick
2005	<i>Mentoring Committee</i> Gloria Green, Chair Sheila Attias Catherine Boscher-Murphy	Donna Fojtlin Linda Rose
2004	<i>Conference Committee</i> Jack Williams, Chair Gisele Joachim Helen Mikulak Catherine Boscher-Murphy Joe Roberto	Woody Lewis Pam Bauer Shawn Murphy Veronica Hall

## YOUNG LEADERS AWARD (new 2004)

YEAR	Recipient	Institution
2021	Michael Murray	Rutgers University
2020	Rachel Mecca	Montclair State University
2019	Rosemary Guichardo	Montclair State University
2018	Nicholas Capodice	Drew University
2017	Asia Taj	New Jersey Institute of Technology
2016	Michael Livio	Princeton Theological Seminary
2015	Hayato Suzuki	Montclair State University
2014	Joanna Cellary	Centenary College
2013	Tammi Hussey	Seton Hall University
2012	Cynthia Montalvo	Felician College
2011	Michael Livio	Princeton Theological Seminary
2010	Stacy Salinas	Bloomfield College
2009	Douglas Wilson	Rutgers University
2008	Karyn Arnold	Brookdale CC
2007	Evelynne Blatt	Raritan Valley CC
2006	Adrienne Hynek	Stevens Institute of Technology
2005	Patricia Guli	Montclair University
2004	Carmen Panlilio	The New Jersey City University

*NJASFAA has ended the Scholarship program, eff. 2018.19*

**NJASFAA Memorial Scholarship** (Awarded as the NJASFAA Scholarship prior to 2016)

Awarded annually at the Spring conference by the Scholarship committee.

**In Memory of:**

**Joseph R. Roberto**

**May 2016**

Year	Recipient	Institution
2018	Briana Trotty	Montclair State University
2017	Christina Culmone	Monmouth University
2016	Daniel Haddad	Rutgers School of Pharmacy
2015	Shehryar Ali Talita Myles Rachel Palmer Meghan Tornatore Shagufta Zareen	Bergen Community College Eastern International College Kean University American U. of Caribbean Sch. Med. St. Peter's University
2014	Sophie Chrisomalis Rose A. Cutropia Zoryana Kaspruk Nadia Schuman Samantha Silvent	Ross University JFK Muhlenberg Snyder Schools Berkeley College Rutgers University Monmouth University
2013	Michelle Callas John Haren Travis Pyle Abdulla Qatabi Tara Vecci	Monmouth University Monmouth University (G&P) Lincoln Technical Institute Kean University Ocean County College
2012	Eric Cirino Jacqueline Norrell Elvis Smith	Monmouth University Felician College Lincoln Technical Institute
2011	Stella Liu Samantha Sieka	Rutgers University Monmouth University
2010	Erick Duverge Justin Eigenbrodt Anne Lowsky Amanda Nisi	Rutgers University Lincoln Technical Institute Brookdale Community College Monmouth University (G&P)

	Alicia Polkowski	Monmouth University (4 yr. Ind.)
2009	Aileen Davila Danielle Diodato Michael Gordon John Otte III Stephany Tuche	New Jersey Institute of Technology Monmouth University Seton Hall University Sch. of Law Engine City Technical Institute Mercer County Community College
2008	Frances M. Borho Heather Harris Ashok Khiamal Michael Sangiovanni Stephanie Schatzle	Brookdale Community College Monmouth University Muhlenberg Reg. Med. Ctr. Monmouth University Richard Stockton College of NJ
2007	Tonya Bradshaw Ivonne Canchon Robert Genarie Cristina Nappi Joseph Nelson Jose Otero	Brookdale Community College Georgian Court College Lincoln Technical Institute Monmouth University Muhlenberg Reg. Sch. of Nursing Rutgers University
2006	Soraya Astrid Cortes Christine S. Boyle Catherine Deatt Melissa Ferrera Aliah Rsheed Eyvenia A. Shashkova	New Jersey Institute of Technology Rutgers School of Law – Newark Felician College Muhlenberg Reg. Sch. of Nursing Omega Institute Montclair State University
2005	Bobbie Artis Mariah Hoffman Diana Keenan Robert Klinger Anna H. Kuras Charles T. Puleo	Berkeley College Gloucester County College Rutgers University Monmouth University Kean University Monmouth University
2004	Chi H. Choi Margaret L. DeJong Elsie T. Helle Michele LaMorte Gina Riese Natalie R. Ruiz	Kean University Monmouth University Georgian Court Muhlenberg Reg. Sch. of Nursing Gloucester Comm. College Rutgers University
2003	Jesse Abraham Gloria Cadavid Sandra Diez Alvin Jones Alfredo Rivas Ilana Waters	Monmouth University The College of New Jersey Rutgers University –New Brunswick Cittone Institute Muhlenberg Reg. Sch. of Nursing Monmouth University

2002	Joseph Camiolo Philip Chase Rainiel Guzman Yolanda Jones Mary-Grace Mompalao Lori Polito	Burlington County College Drew University New Jersey City University Rutgers University - Camden Muhlenberg Reg. Sch. of Nursing Monmouth University
2001	Michel-Ann Dias Myesha D. Hamm Beatrice S. Kinsey Haydee Pinero-Donza Danijela Sain Iwona Spykowski Bryce Vander Voort	Rutgers University Princeton Theological Seminary Sussex County Community College Georgian Court College Stevens Institute of Technology Drew University Cittone Institute
2000	Eric A. Aligo Jennifer Bellars Katherine S. Galaida Donna J. Hadsall Yelena Havryliuk Tara Klemash Virginia Phipps	Kean University Sussex County Community College Centenary College Rutgers University – Camden Stevens Institute of Technology Cittone Institute UMDNJ
1999	Nicole K Carr Yesenia Cruz Sampson Davis Donna Diaz Beth Jervay	Georgian Court College Union County College UMDNJ Muhlenberg School of Radiography Richard Stockton College of NJ
1998	Debra Ford Yamileth Hernandez Christine A. Mabes Lois E. Randolph Suzanne Schmitt	Rutgers University – Camden Drew University Atlantic Community College New Brunswick Theo. Seminary Ann May School of Nursing
1997	Eric Degen Donna Gilmore Fehim Mujic Khawn Quinlan Antonio Torrence	Centenary College William Paterson College Lincoln Technical Institute Bergen Community College New Brunswick Theo. Seminary
1996	Raymond D. Bailey Nick C. Cicchino Tina M. Conte Jacqueline McCrae Horace Means Judith Przybylski	Richard Stockton College of NJ Sussex County Community College Berkeley College of Business Rutgers University - Camden Princeton Theological Seminary Georgian Court College

1995	Rozillia Matthews Chase Cathy L. Connor Connie Ann Hiuser Cynthia Laffey Arturo P. Lewis Mary Ann Schultz Guadalupe Velazquez	New Brunswick Theo. Seminary Somerset County Technical Institute Felician College Mercer County Community College Princeton Theological Seminary Brookdale Community College Caldwell College
1994	Jackie L. Fiorillo Diane G. Kanis Norma M. Matay Kimberly M. Saboski Tomeka Swan	Ann May School of Nursing Bergen Community College Monmouth College Richard Stockton College of NJ Rutgers University
1993	Kelly Brophy Janet Errico Tanya McBride Mamie Mullen Juliet Smith Lewis Watson	Monmouth College Cittone Institute Mercer County Community College Princeton Theological Seminary Rutgers University - Newark Montclair State College
1992	Michelle B. Aulete Barry W. Hamilton Karen Nolla Renee Panecki Estrella Rojas Tracey Rose	Glassboro State College Drew University New Jersey Institute of Technology Sussex County Community College Westminster Choir College Parisian Beauty Academy
1991	Dale P. Andrews Gwendolyn L. Bennett Marjorie L. Goldsmith Eileen Greene Skyler D. Mills Joan M. Sylvester	Princeton Theological Seminary Georgian Court College Raritan Valley Community College Capri Institute New Jersey Institute of Technology Stockton State College
1990	Eileen Morgan David Mostello Krista Quintaglie Patricia Rector Marshall Walters	Rutgers University - Camden Seton Hall University Capri Institute William Paterson College Brookdale Community College

## **L-2: Plaques and Award Wording**

Current contact for plaques and awards:

David Garelick, Director                      p 914-437-9990  
Collegiate Productions                      f 727-231-9662  
901 North Broadway Suite 1  
White Plains, NY 10603

Plaques – Ordered at least four weeks prior to the event.

Sample Wording and Specifications:

### **The Arthur E. Richmond Award and The Thomas C. Scott Award**

8 x 10 with double plates, gold plate on top, oxidized lettering in black:

LOGO  
  
THE NEW JERSEY ASSOCIATION  
  
**OF**  
  
STUDENT FINANCIAL AID ADMINISTRATORS  
  
PRESENTS  
  
**NAME OF PLAQUE**  
  
DISTINGUISHED SERVICE AWARD  
  
to  
  
**- RECIPIENT'S NAME -**

In Recognition Of  
Service to NJASFAA  
And The  
Financial Aid Profession.

**Date of Spring Conf.**

**Name of President**  
President



## **The William G. Murphy President's Award**

7 x 9 double plates, black on top, lettering etched in gold:

LOGO

THE NEW JERSEY ASSOCIATION

OF

STUDENT FINANCIAL AID ADMINISTRATORS

PRESENTS

THE PRESIDENT'S AWARD

to

**- RECIPIENT'S NAME**

IN RECOGNITION OF YOUR  
DEDICATED SERVICE  
TO THE  
FINANCIAL AID COMMUNITY

**Date of Spring Conf.**

**Name of President**  
President

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### **Gavel Plaque**

9 x 12 traditional gavel plaque with gold plate, engraved in black:

Presented to

**President's Name**

PRESIDENT 2000-2001

In appreciation for your service to

N.J.A.S.F.A.A

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## Retirement Award

Retirees are presented with a framed certificate and retiree pin

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### L – 3:

#### Longevity Awards –

These awards are given to NJASF AA members when they reach certain milestones related to years of service in the career.

The awards are:

5 years	brass keychain
10 years	business card holder
15 years	pen set
20 years	leather portfolio
25 years	clock
30 years	coasters
35 years	certificate
40 years	framed certificate

The Longevity awards are given out each year at the annual conference (Spring) to all who qualify. In order to determine the recipients for this award, the Chair of the Awards Committee will request a list of those individuals who meet each category from the Membership Chair prior to the Spring Conference.

Procedures:

- The year that each member began in the Financial Aid field is recorded in the membership database based on self-reported data.
- Prior to the annual Spring Conference, the Membership Chair will generate a list of those members who meet the 5, 10, 15, 20, 25 and 30 year levels. For longevity at the 35 and 40 levels, a certificate is produced. The 35 year certificate is placed in a folio, the 40 year certificate is framed.
- In order to receive their award, the member must attend the annual Spring Conference in the year they are eligible to receive their award.
- Periodically, the Membership Chair can work with the Awards Chair to send a mailing to collect start year information from members in the database. Data can also be collected at each conference and via the membership directory information on the web-site.

## **Appendix M:**

### **Definitions**

#### *Voting Member*

Of the association – shall be any ‘active’ and ‘associate’ member of the association as defined in the Constitution and Bylaws.

Of the Executive Council – shall be defined as any elected officer for the year in question.

Of the Board of Directors – any member in good standing the attends a meeting

#### *Quorum*

As defined in the NJASFAA Bylaws, Article IV Section 2: “Five members shall constitute a quorum at any official meeting of the Council.”

From the Constitution, Article VI Section 1:

The Executive Council shall consist of:

- a) the elected officers of the association,
- b) four councilpersons at large, and
- c) immediate past president.