

APPENDIX 1.1.1

SAMPLE FORMAT

FASFAA POLICY AND PROCEDURE MANUAL	
3. FINANCIAL INFORMATION	OPERATING BUDGET
Effective Date	Policy

Page of

Chapter Number & Name

Name of Policy or Procedure

Effective date of policy or procedure
Or most recent publication date.

Page number and total number of pages
in the policy or procedure

Number of Policy or Procedure

APPENDIX 2.1.1

Bylaws

Of

Florida Association of
Student Financial Aid Administrators

A Florida Corporation Not for Profit

Article I

Offices

Section 1. Principal Office The principal office of the corporation in the state of Florida shall be located in the city of Ft. Lauderdale, county of Broward.

Article II

Membership

Section 1. Classes of Membership

- A. Regular Members Members shall consist of persons in the state of Florida working in postsecondary education or government and responsible for some aspect of the administration of student financial aid and who have paid the annual dues for the current fiscal year and who have been approved by the Executive Board.
- B. Honorary Lifetime Members Honorary lifetime members shall be persons who have performed outstanding service in the field of support and/or administration of student financial aid and who are voted such membership by the Executive Board.
- C. Associate Members Associate members shall be persons who are involved with the administration of financial aid in states other than Florida; persons who are working for lending institutions and organizations; the secondary school system (public or private); or who are associated with other private, community or civic organizations, agencies or programs and who have paid the annual dues for the current fiscal year and who have been approved by the Executive Board. Associate members shall have all privileges of membership, with the exception of holding the office of president, president-elect, secretary, or treasurer.

Section 2. Transfer of Membership Membership shall not be transferable.

Section 3. Terms of Membership Membership shall be on an annual basis corresponding to the fiscal year of the Association. Membership shall terminate when a member no longer is eligible, as defined in Article II, Section I.A.,C. above.

- Section 4. Voting Eligibility and Member Rights Each individual member shall be entitled to one vote on each matter submitted to a vote of the members at meetings of the membership, or by mail. Voting may occur in person at a regular meeting of the membership or by mail-in procedures approved by the Executive Board and in compliance with these bylaws. Only members shall be entitled to stand for election to an office of the association.
- Section 5. Termination of Membership Any member of the Association may be dropped from membership for nonpayment of dues upon action of the Executive Board or by action of the Executive Board for just cause after being afforded the opportunity to be heard by the Executive Board.
- Section 6. Resignation Any member may resign by filing a written resignation with the secretary, but such resignation shall not relieve the member so resigning of the obligation to pay any dues, assessments, or other charges theretofore accrued and unpaid.
- Section 7. Reinstatement Upon written application signed by a former member and filed with the secretary, the Executive Board, by an affirmative vote of a majority of the members of the Executive Board, may reinstate such former member to membership.
- Section 8. Non-liability Members of the Association recognize that one of the purposes of the Association is to provide training and informational services to its members through training conferences and periodic written material. While the Association shall utilize its best efforts to provide its members with the most current information available, there can be no assurances or warranty that its interpretation of any rule, regulation or statute will be in conformance with any present or future interpretation of such rule, regulation or statute by any appropriate governmental authority. Accordingly, each member shall hold the Association harmless from any claims, damages, or liability resulting from such member's use of any information, data, or interpretations as provided to such members by the Association.

Article III

Finance

- Section 1. The fiscal year of the Association shall be from July 1 to June 30.
- Section 2. Income shall be derived from membership dues and such other sources as the Executive Board may approve.
- Section 3. Dues shall be assessed and collected in such amounts and in such manner as may be prescribed by the Executive Board. Any proposal to increase the dues of the Association shall be circulated in writing to all members of the Association affected by such proposal at least thirty (30) days before a vote is to be cast by the membership.
- Section 4. The books of the association shall be audited at the conclusion of each of the Association's fiscal years in the manner prescribed by the Executive Board.

Article IV

Meetings

- Section 1. Meetings of the Association shall be held on such dates and in such locations as the Executive Board shall determine.
- A. All meetings shall be announced in writing to all members at least thirty (30) days in advance.
 - B. A majority of the members present at a meeting shall constitute a quorum.
 - C. An annual meeting of the Association's membership shall be held during the fiscal year of the Association, for the purpose of conducting elections and transacting all business which may be brought before the meeting.

Article V

Executive Board

Section 1. Executive Board Effective fiscal year 2005, the administrative responsibility of the association shall be vested in an Executive Board consisting of the officers of the association, six regional representatives and up to four members-at large, as appointed by the president of the association. There shall be one representative for each of the six regions described by the Association as follows.

There shall be one representative for each of the six regions described by the Florida Department of Education as follows:

- Region 1. Northwest Florida, including Escambia, Santa Rosa, Okaloosa, Walton, Holmes, Washington, Bay, Jackson, Calhoun, Gulf, Liberty, Franklin, Gadsden, Leon, and Wakulla counties.
- Region 2. Northeast Florida, including Jefferson, Madison, Taylor, Hamilton, Suwannee, Lafayette, Dixie, Columbia, Gilchrist, Levy, Citrus, Baker, Union, Bradford, Alachua, Marion, Nassau, Duval, Clay, Putnam, and St. Johns counties.
- Region 3. East Central Florida, including Sumter, Lake, Flagler, Volusia, Seminole, Orange, Osceola, and Brevard counties.
- Region 4. West Central Florida, including Hernando, Pasco, Pinellas, Hillsborough, Polk, Manatee, Hardee, Sarasota, De Soto, and Highlands counties.
- Region 5. Southeast Florida, including Indian River, Okeechobee, St. Lucie, Martin, Palm Beach and Broward counties.
- Region 6. South Florida, including Charlotte, Glades, Lee, Hendry, Collier, Dade, and Monroe counties.

A. Election Officers of the association shall be elected as prescribed in Article VI, Section 2 of these bylaws.

The five (5) regional representatives of the initial Executive Board shall be appointed by the president. Effective fiscal year 1984, the regional representatives shall be elected by their respective constituencies by mail-in ballot from a slate provided by the respective regions. The president shall appoint members-at-large within thirty (30) calendar days of taking office.

B. Terms Effective fiscal year 2005; terms of members-at-large shall be one (1) year. The regional representatives shall serve for periods of two (2) years; the representatives from the odd numbered regions to be elected in odd years and the representatives from the even numbered regions will be elected in even years. All terms of office shall coincide with the fiscal year of the association.

C. Voting All members of the Executive Board shall be voting members.

D. Duties

1. Officers Duties of the officers of the Association shall be as prescribed in Article VI, Section 4, of these bylaws.
 2. Regional Representatives The regional representatives shall serve as liaison persons between the Executive Board and the membership within their respective regions. They shall attend all meetings of the Executive Board and shall hold and conduct regional meetings at the call of the Executive Board. They may hold and conduct such other meetings during the year, as they deem appropriate.
 3. Members-at-Large The members-at-large shall attend all meetings of the Executive Board and shall perform such duties as assigned by the president of the Association.
- E. Vacancies Any vacancy among the regional representatives shall be filled by the Executive Board.

Any vacancy among members-at-large shall be filled by the president.

The Executive Board shall provide advice and counsel to the president and shall act on behalf of the Association, which action shall be reported to the membership at the next meeting of the Association.

Section 2. Quorum A majority of the board members shall constitute a quorum of the board.

Section 3. Meetings The Executive Board shall meet at the call of the president and minutes shall be kept by the secretary.

Section 4. Budget Committee The Executive Board shall function as the Budget Committee of the Association and shall consider annually at the annual meeting of the Association budget proposal for the ensuing year, as submitted by the president-elect.

Article VI

Officers

Section 1. Officers The officers of the Association shall be president, a president-elect, a vice-president, a secretary, a treasurer and a past president, and such other officers as may be elected in accordance with the provisions of the bylaws.

Section 2. Elections and Terms of Office The officers of the Association shall be elected by the membership by mail-in-ballot. The slate of the officers shall be approved by the Executive Board.

The president-elect shall serve one year in that position, a second year as president, and a third year as immediate past president. The secretary and treasurer shall serve for periods of two (2) years; the secretary to be elected in odd years and the treasurer to be elected in even years. All terms of office shall coincide with the fiscal year of the Association. The vice-president shall serve one (1) year. The vice president shall be appointed by the president in 1983-1989, and elected by the membership in subsequent years, beginning in 1989-90.

Section 3. Vacancies In the event of a vacancy in the president's office, the president-elect shall succeed to that office. In the event of a vacancy in the president-elect's office, a special election shall be held. The immediate past president shall chair the nominations committee. In the event of a concurrent vacancy in the president and president-elect's office, a special election shall be held. The vice-president shall assume the duties of the president until a special election can take place. The secretary shall chair the nominations committee. Other vacancies of officer positions shall be filled by the Executive Board.

Section 4. Duties of Officers

A. President The president is the chief executive officer of the Association and shall preside at all meetings of the Association; serve as chairman of the Executive Board; appoint all chairpersons and members of the committees unless otherwise designate; server, exofficio, on all committees; authorize expenditures and have the authority, in addition to the treasurer, to pay bills of the Association; submit an annual report to the Association; and perform such other duties as may be required by the Association.

B. President-Elect The president-elect shall preside at all meetings in the absence of the president; perform all duties as designated by the president or required by the Association; prepare a proposed Association budget for the ensuing year as president for the consideration of the Association at the meeting; and shall be responsible for selecting the chairperson of the conference committee for the annual meetings.

C. Secretary The secretary is the scribe of the Association and the custodian of its records; shall take or arrange to have take, and keep in permanent form, the minutes

of the Executive Board and of the Association; attend to the giving and serving of all notices required by the bylaws of this Association; and keep and update the permanent file of all official documents and publications of the Association and/or Executive Board.

- D. Treasurer The treasurer is the finance officer of the Association and shall receive all Association monies and keep the books of the Association; pay the bills of the Association within thirty (30) days of the authorization of the Executive Board; arrange for the billing and collection of dues and registration fees for meetings of the Association; arrange with the Membership Committee chairperson for the issuing of membership confirmation to current members and maintenance of the official membership roster; provide the Association an account and statement of all transactions at each meeting of said Associations and at such as said Association may from time to time determine and be handled at the expense of the Association, be bonded at the expense of the Association; allow any member of the Association to examine records upon request; and prepare and submit the appropriate state and federal records, as required by applicable laws (Article VII).
- E. Vice President The vice president shall be responsible for all training activities of the Association, including workshops for new aid officers, support staff, lenders, and advanced-level seminars.
- F. Past President The past president shall serve as the FASFAA member of the Southern Association of Student Financial Aid Administrators (SASFAA) Nominations Committee.

Section 5. Removal From Office Elected members of the Executive Board may be removed from office for misconduct, failure to perform the duties of the office, or for other just causes as determined by the Executive Board. Evidence may be presented in open session of the Executive Board. The Board, in executive session, shall consider the charges, review evidence presented by all parties, and reach a decision. A two-thirds vote of the voting members of the Executive Board is necessary for removing the officer. The decision(s) of the Executive Board shall be final. The president shall preside over the proceedings unless the president is being considered for removal from office. In that event, the president-elect shall preside. The Secretary shall record all testimony. Vacancies created through this action shall be filled in the manner prescribed in the bylaws (Article VI, Section 3).

Section 6. Special Elections In the event of a vacancy in the president-elect position or a concurrent vacancy in the president and president-elect positions, a special election shall be called and voting shall take place by mail-in ballot. The eligible voting membership shall be restricted to those paid members as of the date of the vacancy announcement. The nominations committee shall convene and select a slate within twenty (20) days of the notice of the vacancy. Within ten (10) days of the approval of the slate, ballots will be mailed to all eligible voting members of the Association. Announcement of the name of the president-elect of president and president-elect shall be made to the membership no more than sixty (60) days from the initial notice of the vacancy in the position. However, in the event that seventy-five (75) days or less remain from the notice of vacancy until the next regularly scheduled election of officers, the process for filling the vacancy shall coincide with the regular elections.

Article VII

Contracts, Checks, Deposits, and Funds

- Section 1. Contracts The Executive Board may authorize any officers of the Association to enter into any contract or execute and deliver any instrument in the name of and on the behalf of the Association, and such authority may be general or confined to specific instances.
- Section 2. Drafts, Checks, and Other Orders for Payment All checks, drafts, or orders for the payment of money, notes, or other evidence of indebtedness issued in the name of the Association shall be signed by such officer or officers and in such manner as shall be determined by resolution of the Executive Board. In the absence of such determination, such instruments shall be signed by the treasurer or by the president.
- Section 3. Deposits All funds of the Association shall be deposited to the credit of the Association in such banks, trust companies, or other depositories as the Executive Board may select.
- Section 4. Gifts The Executive Board may accept on behalf of the Association any contribution, gift, bequest, or decive for the general purpose of the Association.

Article VIII

Committees

- Section 1. The standing committees of the Association shall be a Nominations Committee, a Budget Committee, a Training Committee, and a Cultural Diversity/Minority Concerns Committee.
- The president-elect shall chair the Nominations Committee and the regional representatives or their designees shall serve as its members. The Executive Board shall function as the Budget Committee. The vice-president shall serve as the chair of the Training Committee. The president shall appoint a chair of the Cultural Diversity/Minority Concerns Committee on an annual basis
- Section 2. Other committees of the Association shall be determined by the president and shall be those deemed appropriate to the fulfillment for the purposes of the Association.
- Section 3. Activities and responsibilities of all committees shall be directed and defined by the president with the approval of the Executive Board.

Article IX

Parliamentary Authority

The rules contained in the most recent edition of Robert's Rules of Order shall govern the Association in cases to which they are applicable and in which they are inconsistent with the Constitution, these bylaws and any special rules or order the Association may adopt.

Article X

Amendments

The bylaws of this corporation may be amended, altered, or rescinded by a majority of the membership present at any regular meeting or at any special meeting called for that purpose, or by mail-in ballot provided that each amendment shall have been proposed in writing by the Executive Board and that a copy of the proposed amendment shall have been mailed to each member of the Association at least thirty (30) days prior to the vote taken.

Adopted September 22, 1983; Bal Harbour, Florida

Amended September 25, 1984; Tallahassee, Florida

Printed June, 1985

Amended May 30, 1996; Miami Beach, Florida

Printed March, 1987

Printed March, 1988

Amended June 19, 1988; St. Petersburg, Florida

Amended May 19, 1989; Tampa, Florida

Amended June 1990; Sarasota, Florida

Amended June, 1993; Palm Beach, Florida

Printed October, 1994

Amended June 2003: Orlando, Florida

Printed June 2003

COPYRIGHTED FASFAA PUBLICATIONS

<u>Name of Publication</u>	<u>Date Copyrighted</u>
President's Survival Guide	1996
30 Years of FASFAA	1996
25 Years of FASFAA	1993
Yellow Pages	12/91
Handbook of State Student Financial Assistance	12/91
Legislative Handbook	12/91
High School Guidance Counselor Resource Book	1990
FASFAA Brochure	1988
Solving the Financial Aid Puzzle Poster	1985

OFFICIAL FASFAA LOGO

Adopted 1988-89

FASFAA Proposed Budget Worksheet

Resources

Category	Detail	Amount
001 Membership	Number of members @ \$20	
002 Fall Conference		
Registrations	Number of registrations @ \$	
Late Fees	Number @ \$	
Extra Meal Tickets	Number @ various meal costs	
Raffle		
Sponsorship		
Other		
Other		
Other		
003 Spring Conference		
Registrations	Number of registrations @ \$	
Late Fees	Number @ \$	
Extra Meal Tickets	Number @ various meal costs	
Raffle		
Sponsorship		
Other		
Other		
Other		
004 Training		
New Aid Officer Registration	Number of registrations @ \$	
New Aid Officer Sponsorship		
Exper. Aid Officer Registration	Number of registrations @ \$	
Exper. Aid Officer Sponsorship		
Support Staff Sponsorship		
Other Workshop Registration	Number of registrations @ \$	
Other Workshop Sponsorship		
Other Training Income		
005 Newsletter		
Advertising	Number of ads @ cost per ad	
Other (specify)		

006 Miscellaneous Income		
Specify		
Specify		
Specify		
007 Special Projects		
Specify		
Specify		
Specify		
008 Interest Income		
Checking Account Interest		
CD Interest		
Other Interest		
009 Prior Year's Income		
President's Retreat		
Sponsorship		
Conference Registrations		
Other		
010 Prepaid Dues	Number @ \$20	
012 Printing Income		
Sponsored Printed Items:		
Specify		
Specify		
Total Resources		

Expenses

101 President's Travel		
NASFAA (July)		
SASFAA Board (July)		
FASFAA Fall Conference		
SASFAA Board (November)		
SASFAA Conference (February)		
Leadership Conference (March)	President-Elect's expenses	
	Other attendees' expenses	
FASFAA Spring Conference		
SASFAA Board (June)		
Regional Meetings		
Committee Meetings		
Other		
Other		
Other		
Other		
102 President's Discretionary		
103 FASFAA Travel		
President's Retreat (after July 1)		
Board Meeting #1		
Board Meeting #2		
Board Meeting #3		
Board Meeting #4		
Board Meeting #5		
Other		
Other		
Other		
104 Printing		
Membership Applications		
Brochure		
Letterhead		
FASFAA Flash		
Membership Directory		
Yellow Pages		

Miscellaneous Printing		
Other		
Other		
Other		
105 Postage		
First Class		
Bulk Mailings		
Express Mail		
106 Supplies and Software		
Account Service Charges		
Other		
Other		
Other		
Other		

107 Fall Conference		
Food Functions:		
Speakers:		
Printing:		
Audio Visual		
Supplies		
Overpayments		
Ribbons/Badges		
Totes/Bags		
Film		
Committee Expenses		
Other		
Other		
Other		

Total Conference Expenses		
108 Spring Conference		
Food Functions:		
Speakers:		
Printing:		
Audio Visual		
Supplies		
Overpayments		
Ribbons/Badges		
Totes/Bags		
Film		
Committee Expenses		
Other		
Other		
Other		
Total Conference Expenses		
109 Training	Note: Individual budget required for each workshop	
New Aid Officer Workshop:		

Meals		
Committee Expenses		
Speakers		
Other		
Experienced Aid Officer Workshop:		
Meals		
Committee Expenses		
Speakers		
Other		
Support Staff Workshops:		
Refreshments		
Committee Expenses		
Other		
Other Workshop:		
Other Workshop:		
110 Committees		
Nominations Committee		
Membership Committee		
Federal Legislative Committee		
State Legislative Committee		
Multi-Cultural Concerns Committee		
Site Selection Committee		
Secondary School Relations Committee		
Special Projects Committee		
Scholarship Committee		
Electronic Communications Committee		
Voc/Tech Issues Committee		
Proprietary Issues Committee		
Other		
Other		
Other		
111 Awards		
Executive Board Plaques		
Sponsor Gifts		
Other Awards / Gifts		
112 Special Projects		
Specify		
Specify		
Specify		
Specify		

113 Newsletter		
Issue 1 Printing		
Issue 1 Mailing		
Issue 2 Printing		
Issue 2 Mailing		
Issue 3 Printing		
Issue 3 Mailing		
Other		
114 Secretarial Services	# Of Hours @ \$ per hour	
115 Corporate Expenses		
Audit		
Corporate Fees		
Music Rights		
Checks		
Storage		
Other		
Other		
Other		
116 Prior Year Expense		
President's Retreat		
Spring Conference		
Printing		
Other		
Total Expenses		

Association Budget

As the President of FASFAA, you are the chief operations officer of the Association. This responsibility carries with it a responsibility for the Association's finances, from the budget to the administration of the funds. Though it is easy to attempt to relegate all budget activities to the elected Treasurer, you will always bear ultimate responsibility for budgetary matters. As you prepare for your year, plan to include time for fiscal matters.

Communication with the Treasurer is essential. If you are elected the same year the Treasurer is, then you will have the advantage of working with the individual for one year prior to your term as President. This will allow you the opportunity to get to know the person and discover his or her strengths and weaknesses, giving you the opportunity to plan your oversight of the fiscal areas accordingly. If the Treasurer is elected the year you assume the presidency, you will need to begin dialogue with that individual soon after the election. Remember, even though the Treasurer was elected by the membership, you are the leader and bear ultimate responsibility for the Association and its finances.

Preparing Your Projected Budget

When you are elected, one of the first tasks you face is deciding what you want to accomplish in your year. The start of this process is the dream phase, while the conclusion is reality. What you want to do, and what you can do are often two distinctly different things. Usually what you can do is a focusing of your dreams into the reality referenced above. Part of the reality you are called to deal with is your budget. It is your job, with the guidance of those around you and those you have selected to work with you, to create the budget for the year. As you begin this process you must ask the following questions:

- What do I want to do in my year?
- What can I afford to do in my year?
- What is the budget for the current year?
- Are we meeting budget?
- How much of an increase in budget can I realistically expect?
- What are my sources of revenue?
- Is there anything pending that could impact revenue?
- What items are in this year's budget?
- Which items in this year's budget do I need to keep?
- What items in this year's budget can I eliminate?
- What are the Association's fixed expenditures?
- What are the Association's variable expenditures?
- What are our current reserves?
- Are our reserves enough to cover an emergency?
- What are the Association's liabilities?

APPENDIX 3.1.2

When starting to construct your budget, begin by looking at budgets for the previous three years. Review the strengths and weaknesses of each and make assumptions for your year based on actual revenues and expenditures, allowing for changes in membership dues, conference fees, projected membership and sponsorship. Project the cost of the events and activities you would like to hold in the year you will serve as president. Add up your projected revenue and begin subtracting your expenses. When you reach zero, stop and re-evaluate. To project an increase in revenue beyond what has occurred over the last three years is not wise. If you over-project revenue, and break the budget, your year as president will be negatively stigmatized. Use sound judgment.

Cost projection is never easy. Try to estimate costs for the current year and add 5%. This is not perfect, but it is usually safe. The 5% will need to be adjusted if you take office in a period of high inflation.

One of the most difficult cost projections you have is for conferences. As you are establishing a budget, talk with the Site Selection Chair and find out what current food prices are. This is the area that is most elusive in conference costs. Care must be exercised in determining reasonable levels of sponsorship for regularly sponsored conference events, especially high-cost meal functions. Consultation with an experienced Vendor/Sponsor Coordinator is essential in understanding the impact that effective sponsorship can have on the success of future conferences (as well as the current event).

Estimating membership for your year is vital, since much of your revenue comes from membership dues and attendance at conferences. Looking at your environment is critical. You must know if anything could affect the size of FASFAA. Remember to look at potential state and federal reductions that could impact institutional budgets. If a school cannot pay memberships, then the number of members will decrease. Should you have an increase in the cost of FASFAA membership or conference fees in your year, anticipate a smaller membership.

You should be very familiar with the extent to which FASFAA relies upon sponsorship to conduct its activities throughout the year and how sponsorship impacts the budget. If there is an increase or decrease in sponsorship for particular events, there can be a dramatic effect upon the budget. As you prepare your budget, it is critical to know the percentage of revenue that comes from sponsorship, membership dues and conferences.

Work with other elected officers and committee chairs of the Association to determine their budget needs. As you have an elected Vice President for Training, you must find out what his or her plans are and try to fit them into your budget. Remember, you are the President and this is your budget. If you feel any proposed expenditure is exorbitant or unnecessary, express your opinion up front. Be honest and candid with those who have some control over your budget, but stand firm if you feel you must.

You may wish to ask the prior Treasurer and the newly elected Treasurer to work with you to establish your proposed budget. Don't hesitate to ask previous presidents and treasurers about their experiences with budgeting. Each one has a success story and a failure to share with you. By utilizing their collective knowledge and experience, you can avoid some of the pitfalls that you might otherwise face.

In preparing your estimate budget, remember that there is only so much revenue available. If you choose to spend resources on certain activities or items, it will not be available for other purposes. Each president (with Board approval) makes choices on how FASFAA resources should be spent. Future policies may dictate a minimum amount of revenue received during the year, which should remain unspent; at the very least, expenses should never exceed the revenue received during the fiscal year.

APPENDIX 3.1.2

Complete the budget worksheet to estimate revenues expected and estimated costs. You will use this to prepare your proposed budget for submission to the Executive Board for approval.

Once the year is underway, you will ask your committee chairs to submit their individual budgets for their committees. Some committees have their own budget categories, such as Training and Conferences. The Vice President should provide a budget for each training activity. This can be entered into the overall budget worksheet. The same procedure should be done for the fall and Spring Conferences. Other committees which do not have individual budget categories will submit Budget Estimate/Request Forms to request funds. Once all committee budgets have been submitted, the President will have a better idea of whether sufficient funds were set-aside in the proposed budget. Adjustments can then be made prior to the second Executive Board meeting of the year, at which the budget will be officially approved for the year.

At the completion of the year, the budgeted expenses for all items should be compared with the actual amounts. This will help the incoming President-Elect to budget effectively.

Suggestions for Minimizing Association Costs

Conferences:

- Budget to make a profit at each conference, as this is what supports other Association activities throughout the year.
- Use sponsor funds wisely; as for sponsorship only on items that are vital to the conference's success, if necessary.
- Hold only one sponsor reception per year instead of one per conference. This mirrors what FASFAA does to recognize its leaders.

Executive Board Travel:

- Instead of including all committee chairs at all Executive Board meetings, invite only those who have business to discuss at each particular meeting.
- Hold meetings in a central location that is easy to reach and where there are inexpensive flights from most cities in Florida.
- Hold one-day meetings to avoid overnight expenses.
- Shop for an inexpensive location for the retreat, preferably in a centrally located city. Seek sponsorship for meal functions and other items.

Committees:

- Evaluate committee representation carefully. Encourage committee chairs to have a balance between representation and cost.
- Do not encourage an excessive number of meetings but a small number of productive meetings.
- Evaluate whether all committee members are needed at each meeting.
- The chair should determine the average hotel cost for the area and advise committee members.

Mailings:

- Instead of printing originals of letterhead and FLASH paper when doing membership mailings, use photocopies.
- Print both sides of paper.
- Keep a close watch on inventory and shift it from where it is being stockpiled to where it is needed.
- Use e-mail to the extent possible to save on printing costs.
- Never pay for typesetting to do the Newsletter.
- Don't duplicate what other associations are providing for free.

Printing:

- Bid out services for the year with one or two printers.

General:

- Evaluate expenditures based on cost/benefit relationship, number of members benefiting from the expense, whether it is a long-term investment, and whether an expense is more important than other activities of value to the membership.
- Ask whether an expense is nice or necessary.
 - Seek sponsorship creatively and use sponsor funds wisely.

FASFAA
Five-Year Fiscal Plan
1998 – 2003

Goal: To protect and improve the financial health of the Association.

OBJECTIVE 1: Target Association revenues in excess of the opening budget to protect FASFAA from financial loss.

STRATEGIES:

- a. Establish a threshold below which FASFAA could potentially suffer heavy financial liabilities and provide an expectation to build a reserve that would reach 50% of the Association's annual operating expenses by the end of the next five years (June 30, 2003).
- b. Monitor progress toward reaching the desired reserve and gradually build to a reserve of one year's operating expenses as a long-term strategy.
- c. Provide for the use of excess funds once the target has been reached.

OBJECTIVE 2: Maximize the amount of resources FASFAA has available for its use each year.

STRATEGIES:

- a. Develop and implement an investment strategy to take advantage of the earning potential on funds not currently needed to cover operation expenses.
- b. Place a greater reliance on individual membership dues as a source of revenue.
- c. Establish a fee structure for conferences and Association activities, which is commensurate with services, costs, and potential liabilities.
- d. Maximize the use of funds provided through sponsorship.

OBJECTIVE 3: Minimize unnecessary expenses and reduce potential liabilities.

STRATEGIES:

- a. Implement waste reduction practices and exercise spending when goods and services could be obtained for less.
- b. Ensure that the Executive Board, committee chairs and committee members are familiar and comply with policies and procedures which affect reimbursement, budget, authorization, contracts, and other policies which affect the Association's budget and operating costs.
- c. Strengthen internal financial controls to ensure that expenditures of funds are authorized, paid, and reported in compliance with good accounting practices and are in concert with the Association goals and objectives.
- d. Provide guidance for averting a financially disastrous conference in the event of unforeseen circumstances or occurrences.
- e. Scrutinize and negotiate hotel contracts to minimize FASFAA expense and liability.

OBJECTIVE 4: Place a greater emphasis on planning and evaluation of finances and increase the membership's understanding of FASFAA's financial condition.

STRATEGIES:

- a. Prepare a more detailed proposed budget and provide for a mechanism to adjust the budget once goals for each year have been established.
- b. Conduct a comprehensive review of the Association's financial records every five years to re-evaluate FASFAA's long range fiscal plan.
- c. Change the accounting method from a "cash basis" to an "accrual basis" in order to better understand the income and expenses of FASFAA and to better evaluate the costs of actual events and activities.
- d. Identify and prepare for any environmental influences that may significantly reduce income or increase expenses.
- e. Strengthen and support the role of the Budget Committee in the Association's activities.
- f. Disseminate information about the Association's fiscal plan and its development to the membership.

APPENDIX 3.6.1

Software Owned by FASFAA

1. LOTUS 1-2-3, release 2.2
2. Nutshell – The Database Manager (Nashoba Systems, Inc.)
3. Nametags (SASFSA program, works with Nutshell)
4. Microsoft Excel for Windows, version 4.0
5. Microsoft Word
6. Quicken, version 3.0 for Windows
7. Quick Books, version 2.0 for Windows
8. Quick Invoice, version 1.0 for Windows
9. Quicken Deluxe, version 5.0 for Windows
10. Quicken, version 6.0 for Windows
11. Filmmakers Pro
12. MS Office, 97 Professional

Hardware Owned by FASFAA

1. Dell Latitude LX 1486 100MHz Notebook Computer
Serial Number: #9605006
Acquisition Date: March 4, 1996
2. Hewlett Packard DeskJet 600 Printer
Serial Number: #MY63C1T01B
3. M12 Mensasera Modem 33.6 kbps
Serial Number: #9609U001664

APPENDIX 3.6.3

Software/Hardware Borrowing Agreement

The Software and/or Hardware indicated below are borrowed for FASFAA business, and will be used solely for the purpose stated below. In recognition of copyright laws, this Software will not be copied or used in any way, which would infringe on the copyright.

I agree to maintain the Software and/or Hardware in good condition and return it to the FASFAA Treasurer promptly upon my completion of this business.

Software/Hardware borrowed _____

Purpose _____

Printed Name _____

Signature _____ Date _____

GENERAL EXPECTATIONS OF BOARD MEMBERS

General: As a board member, you are considered to be a leader in the financial aid profession and as a leader, are expected to set an example for all members of the Association and for external constituencies.

Each board member is responsible for obtaining pertinent information or files, which his or her predecessor may have accumulated that would be of assistance in performing the duties of the position.

Meetings: Please make every effort to attend all board meetings and stay through the end of the meeting. All eligible expenses related to attendance at a board meeting will be paid by FASFAA, with the exception of travel expenses when a board meeting is held in conjunction with another FASFAA workshop or conference. In the event that you cannot attend, please contact the president as soon as you know, so that your hotel room can be canceled and the agenda can be adjusted, if necessary. While you are free to ask someone else to attend the meeting in your absence, you cannot turn your vote over to someone else.

To keep travel expenses for the board as reasonable as possible, all rooms will be booked as double rooms, sharing with another board member. If you elect to take a single room, FASFAA will not reimburse you for the additional expense.

Reports: All reports to the board should be in written form. Please bring 30 copies of your report to each board meeting.

All reports should be in two sections: report of activities/information items and action items. In order to complete the agenda within one day, only action items will be brought to the table for discussion, unless a board member has questions or requests discussion about the items in the information section. Board members are expected to attend the entire meeting and participate fully in the discussion of any topics brought before the board for discussion.

For the first board meeting, all individuals should be prepared to speak, whether or not there are any action items. You should outline your objectives and seek input for the board for other ideas and suggestions for reaching the goals outlined during the retreat.

Newsletters: All board members and committee chair are expected to provide an article for each newsletter concerning his or her area of responsibility. You may also provide any additional article you would like to submit.

Legislation: All board members should be actively involved in responding to all pertinent state and federal legislation and regulations that arise during the year. This is a responsibility of all FASFAA board members, not just the federal and state relations committees.

Committee

Makeup:

Within certain limitations, you are free to select the members of your committees. Every effort should be made to ensure that you have representation from all relevant sectors, that you have statewide representation, if appropriate, and that you include members with diverse ethnic and cultural backgrounds. Make every effort to include members who have volunteered to serve. These are people that want to get involved, and we should make use of their interest and enthusiasm. We owe it to the Association to give new people a chance to show what they can do. Please involve them.

Committee members should serve on only one committee, so that we can involve as many members as possible. This will not always be possible, as some committees will have an overlap of responsibilities.

Policies and

Procedures:

As a board member or committee chair, you are responsible for adhering to and updating your section of the policy and procedure manual. If you have any suggested changes, please bring them before the board and implement them.

TRAINING COMMITTEE

Examples of Training Activities

Training activities have included, but are not limited to:

- Beginning Aid Officer Workshop
- Support Staff Workshop
- Experienced Aid Officer Workshop
- Drive In Workshop
- The Yellow Pages
- FSAG Manual

**FASFAA
Budget Estimate / Request Form**

Purpose and Routing: This form is to be used by any committee, which expects to have expenses and *does not* have its own budget category. Committee chairs must submit this completed form to the President for approval. The Treasurer establishes the budget, keeps the original, and mails a copy to the committee chair.

Committee Name	Committee Chair
Number of Committee Members	Institution
Number of Meetings Expected	Address
Primary Goal of Committee	Address
	Telephone/Fax/E-mail

I. Estimated Expenses for Year (July 1 – June 30)

A. Travel (i.e., airfare, mileage, lodging, meals)

Chairperson	\$ _____
Committee Members	\$ _____
Total	\$ _____

B. Supplies and Materials (please itemize)

_____	\$ _____
_____	\$ _____
_____	\$ _____
Total	\$ _____

C. Postage

	\$ _____
--	----------

D. Other Expenses (please itemize)

_____	\$ _____
_____	\$ _____
_____	\$ _____
Total	\$ _____

TOTAL EXPENSES: \$ _____

II. Estimated Income/ Revenue for Year (NOTE: Workshops require an individual budget in addition to the estimate provided here.)

A. Activities or Projects (please itemize)

_____	\$ _____
_____	\$ _____
_____	\$ _____
Total	\$ _____

B. Sponsorship Expected (please itemize)

_____	\$ _____
_____	\$ _____
_____	\$ _____
Total	\$ _____

TOTAL INCOME/REVENUE:

\$ _____

Signature of Committee Chair

Date

Signature of President

Date

SPECIAL PROJECTS

Examples of Special Projects completed:

- Rewriting of the Policy and Procedure Manual
- Assembling historical information needed to write the 25-year history of the Association
- Investigating the ability to offer professional liability insurance to our members

RESEARCH COMMITTEE

Research Activities

- | | |
|---------|--|
| 1983-84 | Study to determine whether or not FASFAA should continue certification activities. |
| 1984-85 | Compilation of FASFAA history. |

FASFAA CERTIFICATIONS

Members Holding FASFAA Certification

Spring, 1977:

Bill Armstrong
Doris Batsel
Larry Benson
Bill Gentry
Helen Glenn
George Goldsmith
Ron Hammond
Rufus Jefferson
Marilyn MacGuire
Thomas Mahoney
Steve Pritz
Dan Smith
Liz Sweeney

Spring, 1978:

Larry Arnold
Karen Fooks
Gwyn Francis
Margaret Frost
Dave Hartshorn
Bob Kruntorad
Judith Marty
Carrie Tutson

Spring, 1979:

Jack Agett
Thomas Calhoun
Barbara Kay
Janis Gard
Diane Harrison
Elizabeth Maguire
Margaret Morris
Preston Rosser
Shirley Tarr

Fall, 1979:

Linda Downing
Helen Fraed
Saundra Inge
Marge Kaczynski
Alton Royal

Spring, 1980:

Judith Berson
Hamid Faquire
Emilio Garcia
Gail Janssen
Jim Kennedy
George McCowan
Ronnie Oard

Spring, 1981:

Claudia Geary

Spring, 1982:

Lunita Knox Shearer
Robert Sterling
Michael Wernon

Spring, 1983:

Darrill Simonson

HISTORY OF SITES, DATES & THEMES

YEAR	DATES	SITE/LOCATION	THEME
Spring 68		Orlando, Florida	
Spring 69		Daytona Beach, Florida Daytona Beach Community College	
Fall 70		Tampa, Florida University of Tampa	
Spring 71	May 6- 7,1971	Miami, Florida Eden Roc Hotel	Student Financial Aid: Its State & Local Perspective
Fall 71	Oct. 6-8, 1971	Orlando, Florida Hilton Inn South	
Spring 72	May 4-5, 1972	St. Augustine, Florida Ponce DeLeon Lodge	
Fall 72		Tampa, Florida International Inn	
Spring 73	May 9-11, 1973	Key Biscayne, Florida The Key Biscayne Hotel	N/A
Fall 73	Oct 4-5, 1973	Tallahassee, Florida Holiday Inn	N/A
Spring 74	May 21-23, 1974	Naples, Florida Beach Club	N/A
Fall 74		Pensacola Beach, Florida Galatea Inn	
Spring 75		Naples, Florida	
Fall 75	Sep 7-9, 1975	Gainesville, Florida Hilton Hotel	N/A
Spring 76	May 19-21, 1976	Orlando, Florida Ramada Inn West	N/A
Fall 76	Sep 29-Oct 1, 1976	Tampa, Florida Host Airport Hotel	N/A
Spring	May 1-	Miami, Florida	A Decade of FASFAA Coordination from Organization to

YEAR	DATES	SITE/LOCATION	THEME
77	3,1977	Marriott Hotel	Certification
Fall 77	Oct 5-7, 1977	Orlando, Florida Hilton Inn South	Professional Involvement for a Transitional Era (Unfrustrating the Frustrated)
Spring 78	May 23-25, 1978	Ft. Lauderdale, Florida Pier 66	N/A
Fall 78	Oct 2-4, 1978	Daytona Beach, Florida Holiday Inn	N/A
Spring 79	May 23-25, 1979	Tampa, Florida Air Host Hotel	N/A
Fall 79	Oct 3-5, 1979	Jacksonville, Florida Skycenter Inn	N/A
Spring 80	May 27-30, 1980	Palm Beach, Florida The Breakers	N/A
Fall 80	Sep 30-Oct 3, 1980	Orlando, Florida Court of Flags Hotel	N/A
Spring 81	May 26-29, 1981	St. Petersburg, Florida Don Cesar Beach Resort	Ramification of Reauthorization: The Next Five Years
Fall 81	Sep 23-26, 1981	Tallahassee, Florida Hilton Hotel	N/A
Spring 82	Jun 7-11, 1982	St. Petersburg, Florida Don Cesar Resort Hotel	Professionalism: The Challenge & Opportunity
Fall 82	Oct 5-8, 1982	Daytona Beach, Florida Daytona Hilton	Back to Basics
Spring 83	Jun 6-10, 1983	Saddlebrook, Florida Saddlebrook Resort	The State of the State
Fall 83	Sep 20-23, 1983	Bal Harbour, Florida Sheraton Bal Harbour	The Eye of the Hurricane: Storm Warning in Financial Aid
Spring 84	May 22-25, 1984	Jacksonville, Florida Hilton Hotel	Bridging the Gap
Fall 84	Sep 24-26, 1984	Tallahassee, Florida Hilton Hotel	A Search For Excellence

YEAR	DATES	SITE/LOCATION	THEME
Spring 85	June 12-14, 1985	St. Petersburg, Florida Don Cesar Resort Hotel	Nuts & Bolts
Fall 85	Oct 27-30, 1985	Lake Buena Vista, Florida Royal Plaza Hotel	There's Magic in the Air
Spring 86	May 27-30, 1986	Miami Beach, Florida Fountainbleau Hilton	Miami Advice
Fall 86	Sep 28-30, 1986	Jacksonville, Florida Sheraton St. John	The Waterway to the Future - Navigating a New Course
Spring 87	May 26-29, 1987	Tampa, Florida Hyatt Regency Westshore	Birds of a Feather Work Together
Fall 87	Sep 28-30, 1987	Orlando, Florida Holiday Inn - Crowne Plaza at the Florida Mall	Proud Past - Challenging Future
Spring 88	Jun 9-11, 1988	St. Petersburg, Florida Don Cesar Resort Hotel	New Approaches to Changing Directions
Fall 88	Oct 5-7, 1988	Jacksonville, Florida Jacksonville Marriott Hotel	Student Resources: A Capital Priority
Spring 89	May 17-19, 1989	Tampa, Florida Hyatt Regency	We Touch the Future
Fall 89	Oct 2-4, 1989	Orlando, Florida Sheraton Crowne Plaza	Professionals with a Vision
Spring 90	Jun 6-8, 1990	Sarasota, Florida Hyatt Sarasota	Financial Aid Professionals: Top Performers in 3 Rings
Fall 90	Oct 8-10, 1990	Daytona Beach, Florida Marriott Hotel	Staying on Course Through Uncharted Waters
Spring 91	Jun 2-5, 1991	Ft. Lauderdale, Florida Pier 66 Hotel	Sailing into the Future
Fall 91	Oct 7-9, 1991	Orlando, Florida Twin Towers Hotel & Convention	Lights! Camera! FASFAA

YEAR	DATES	SITE/LOCATION	THEME
		Center	Action in the 90's
Spring 92	May 27-29, 1992	St. Petersburg, Florida Don Cesar Resort Hotel	Crossing the Finish Line

YEAR	DATES	SITE/LOCATION	THEME
Fall 92	Sept. 30 - Oct. 2, 1992	Jacksonville, Florida Omni Hotel	"Navigate The 90's"
Spring 93	June 6-9, 1993	Palm Beach, Florida The Breakers	"Celebrating 25 Years of Excellence...Sterling Reflections, Glimmers of Gold"
Fall 93	Sept. 26-29, 1993	Maitland, Florida Sheraton Orlando North	"FASF AA Spirit: Teamwork for the 90's"
Spring 94	June 1-3, 1994	Ft. Myers, Florida Sanibel Harbour Resort and Spa	"FASF AA Involvement: Connection to the Future"
Fall 94	Oct. 26-28, 1994	Ft. Lauderdale, Florida Ft. Lauderdale Airport Hilton	"Soaring to New Heights"
Spring 95	June 12-14, 1995	Ponte Vedra Beach, Florida Marriott at Sawgrass	"FASF AA, Driving Forward, Improving Your Game"
Fall 95	Oct. 9-11, 1995	Lake Buena Vista, Florida Grosvenor Resort at Lake Buena Vista	"Accept the Challenge"
Spring 96	May 29-31, 1996	Ft. Myers, Florida Sanibel Harbour Resort and Spa	"Port of Call-21st Century"
Fall 96	October 21-23, 1996	St. Petersburg, Florida St. Petersburg Hilton and Towers	"Fountain of Strength-Thirty Years of Service"
Spring 97	June 17-20, 1997	Tampa, Florida Saddlebrook Resort Wesley Chapel, Florida	"Beyond Reauthorization: The Renaissance of Financial Aid"

YEAR	DATES	SITE/LOCATION	THEME
Fall 97	October 14-16, 1997	Miami, Florida Miami Airport Hilton	Hot Topics in the Tropics
Spring 98	May 27- 29, 1998	Ft. Myers, Florida Sanibel Harbour Spa and Resort	“Rays of Hope and Golden Opportunities”
Fall 98	Oct. 7-9 1998	Westin Hotel, Ft. Lauderdale	"Staying Afloat Through Turbulent Times"
Spring 99	June 8-11	Innisbrook Resort, Tarpon Springs	"The Wind Beneath Their Wings"
Fall 99	October 6-8	Adam's Mark, Orlando	"Back to School with FASFAA "
Spring 00	May 31- June 2	Sanibel Harbour Resort, Ft. Myers	"Honoring the Past, Creating Our Future"
Fall 00	October 18-20	Hilton Miami Airport, Miami	"Voices of the Past...."
Spring 01	May 29- 31	Tampa Marriott Waterside, Tampa	"Visions of the Future"
Fall 01	October 10-12	Adam's Mark, Jacksonville	“New Directions: Sharing the Vision”
Spring 02	June 5-7	Sanibel Harbour Resort, Ft. Meyers	“Smooth Sailing on the USS Sanibel”
Fall 02	October 30 – November 1	Hilton Sandestin Beach and Golf Resort, Destin	“Fishing for Your Destiny”
Spring 03	May 21- 23	Wyndham Palace and Resort, Orlando	“Celebrate FASFAA Magic”
Fall 03	October 26-29	Naples Beach Hotel and Golf Resort, Naples	“Time for a Cool Change”
Spring 04	June 7-11	Sanibel Harbor Resort & Spa, Ft. Meyers	“Shake It Up”
Fall 04	Nov. 10 - 12, 2004	Hilton Sandestin Beach and Golf Resort, Destin	“Integrity through Ownerships”
Spring		Miami Beach,	

This section discusses the possible negative events, which could occur, and strategies, which should be employed to either recoup or prevent financial losses to the Association. All of the following conditions must be evaluated in terms of the date of occurrence in relation to the date of the conference.

Omissions in Hotel Contract

Should it be noted that the contract with the hotel did not provide for certain services, which will be of cost to the Association or should FASFAA determine that the original contract contained a commitment that the Association no longer wishes to honor:

- Every attempt should be made to work with the hotel to re-negotiate the terms of the contract.
- Another means of providing the service or funding for the event should be considered.
- FASFAA should consider seeking sponsorship, if possible and appropriate, for the previously contracted event or activity

Loss of Sponsorship

Should FASFAA be informed of the loss of sponsorship prior to the Executive Board meeting during which the proposed conference budget is considered and approved by the Executive Board, this information should be included in the proposed budget. If it occurs at a later date, the Conference Chair must submit alternatives to the Budget Committee (or, at a minimum when it is not feasible to call a meeting of the entire Board, the Officers of the Association at a special meeting) that consider an appropriate course of action. In addition, the Conference Chair should be prepared to provide alternatives for the Board to consider.

To remedy the loss of sponsorship for an anticipated event, which is critical to the program (such as the Awards Banquet), the following course of action is necessary:

- The sponsorship chair should immediately solicit sponsorship from other sponsors to cover the event or activity.
- If the event or activity can be co-sponsored by two or more sponsors and the sponsors are agreeable to the arrangement, the event should be co-sponsored. FASFAA may wish to participate as a co-sponsor if this is agreeable to all parties.
- Recognize that a higher expected attendance (and thus revenue) may be sufficient to cover the loss.
- After reviewing the contract, consideration should be given to moving the event off-site at a lower cost for another sponsor, or eliminating the function in its traditional format in favor of another which costs significantly less (e.g. an Awards Reception with dinner on one's own following the reception). Of course, contractual obligations might prohibit this (a thorough understanding of the contract is, of course, critical).
- An increase in the registration fee should be implemented to offset the cost of the event (assuming there is sufficient time to consider this alternative).
- Consideration should be given to the overall cost of the site for members; the extent to which sponsorship has already been committed; the expected attendance, and other factors, which could affect the decision.

Extremely Low Attendance of Paid Members

If attendance is projected to be lower than usual and that expectation occurs prior to the time the Executive Board approves the proposed budget, those figures should be reflected in the proposed budget.

If the lower numbers are not known until after about that time, the following course of action should be undertaken:

- The hotel contract should immediately be reviewed to determine the financial impact and whether it is still within the time frame to adjust estimates with the hotel for the number of room nights expected, conference space needed, and meal guarantees.
- The Vendor Sponsor coordinator should be informed, and immediately communicate with our vendors and sponsors any expected decrease in attendance and the cost of their events. The President and Treasurer should likewise be informed.
- The conference committee should be informed of the lower attendance in order to minimize expenses for various items already budget (printed materials, etc.).
- Meal guarantees should be closely monitored to ensure that they are adjusted accordingly.

Natural Disasters

- For the most part, natural disasters which affect a conference facility are covered specifically in each hotel contract.
- A severe weather occurrence, which strikes the state and prevents a significant number of members from attending the conference, should be handled as any other situation in which a lower number of attendees are expected.
- An awareness of weather conditions in the region is necessary to project the impact on some of our vendors and sponsors to attend. While members of FASFAA, some may take principal residence in another state.

FASFAA AWARD RECIPIENTS

Honorary Lifetime Members

Kinston Johns
Kermit J. Silverwood
George Goldsmith (deceased)
William Armstrong
Doris Batsel
David Hartshorn
Larry Benson
William Gentry (deceased)
Helen Fraed
Edward Marsh
Carrie Tutson
Bill Baker
Judith Marty
Douglas Turner
Evelyn Sebree
Larry Arnold
Judith Berson
Clint Cooper
Judith Berson
Olga Moas
Alton Royal
Preston D. Rosser
Elizabeth Sweeney
Margaret Morris, 2004

Kingston Johns

Certificate of Appreciation Award Recipients

Danny Quagliatta, 2004
Wintley Phipps, 2003
Lt. Frank Brogan, 2002
Florida Senator Carrie Meek, 1991
Dr. Lynda Davis, Washington
Representative for the Florida
Department of Education, 1986
Florida Senator Carrie Meek, 1986
Congressman Lawrence Smith, 1986
Don Smading, 1981

Distinguished Service Award Recipients

Kathy Campbell, 2004
Claude Collier, 2002
Fred Sellers, 1998
Jack Agett, 1997
Richard T. Lutz, 1993
Dallas Martin, 1992
Ines Twomey, 1989
James Carr, 1987
Larry Floyd, 1987
Bob Henker, 1987
Jeanne Burke, 1986
Claudia Geary, 1986
Jerome Lee, 1986
Don Smading, 1984
Ernest Smith, 1984

Lifetime Service Recognition Award Recipients

Rogers Wieland, 2004
Joye M. Beneyfield, 2004
Tom Szymkowski, 2004
Robert Sterling, 2004
Tony Gordon, 2004
Jane Feehan, 1994
John Walker, 1992
Jim Kennedy, 1992
Cliff Mc Griff, 1995
Laura Galvis, 1996
Dan Smith, 1996
Reuben Sitton, 1996
Mary Willis, 1996

AWARDS RECEIVED BY FASFAA

<u>Name of Award</u>	<u>By Whom</u>	<u>Date</u>	<u>Reason Given</u>
Honorable Mention	NASFAA	1997	Survival Guide for Future FASFAA Presidents
NASFAA State Award	NASFAA	1992	Multi-Cultural Diversity and Immigration Issues in the 1990's: The Plight of the New American. Coordinated by Ray Pranske, 1991-92 FASFAA President Elect, Chair Training Committee; 1991-92 FASFAA President, Peggy Loewy-Wellisch.
NASFAA State Award	NASFAA	1991	For Service to the Profession: Legal Issues Workshop. Coordinated by Jack Agett, Member, Training Committee; 1990-91 FASFAA President Karen Fooks.
NASFAA State Award	NASFAA	1987	For Service to the Profession: The Yellow Pages. Coordinated by Karen Fooks, Chair, Training Committee; 1986-87 FASFAA President, Alton Royal.
NASFAA State Award	NASFAA	1986	For Service to the Profession: Statewide Coordination of Financial Aid Awareness Week. Coordinated by Evelyn Nelson, Chair, Secondary School Relations Committee; 1985-86 FASFAA President, Ronnie Oard

Bonnie Long Pirkle

May 31, 1941 – August 31, 1994

Bonnie grew up in South Carolina and Georgia in a very close-knit family. Each summer the entire family would gather for a week together at the beach in South Carolina, a tradition which began in Bonnie's childhood and continues on. It was one of her favorite places to be.

She began her professional career after she had already had her two children. Bonnie's life in financial aid began when she accepted a position at Hall School of Nursing in Gainesville, Georgia in 1970. There she rose from the Nursing Department's secretary to Director of Student Services. During that time she mastered both financial aid as well as admissions and traveled throughout the area-recruiting students. She was instrumental in helping obtain federal eligibility in anticipation of the merger with Brenau College in 1978 and became the new institution's Director of Financial Aid. She earned her baccalaureate degree there while working full-time. A special place in her heart was always reserved for nursing students because of her experience at Brenau College/Hall School of Nursing.

Bonnie came to Florida in 1980 upon accepting a position at Daytona Beach Community College, where she was Assistant Director until 1984. She then moved on to Director of Financial Aid positions at Central Florida Community College until 1987 and at Seminole Community College until 1992.

It was in 1992 that she accepted the position of Marketing Manager for Chase Education Finance Center. In that position she was responsible for serving schools in four states in the southeast. As a traveling representative, she was able to use her best talents and was able to make friends in financial aid offices throughout the southeast.

Throughout her career Bonnie made time for additional professional activities. Her two favorite activities were coordinating training activities and planning financial aid conferences. She served FASFAA in these capacities as well as in many other roles over the years. In addition, she was active in the Florida Association of Community Colleges (and served as its Financial Aid Commission Chair in 1992); the Florida Council of Student Financial Aid Advisors; Southern and National Associations of Student Financial Aid Administrators (SASFAA and NASFAA); and conducted program reviews of federal nursing loan programs for the Department of Health and Human Services.

Bonnie was known as a hard-working professional who could always be counted on; as someone who was knowledgeable about any financial aid topic; as someone who truly cared about students and her colleagues; as someone who could never say "no" to a request from anyone who needed her help.

Many adjectives come to mind when describing Bonnie as a person – vivacious, perky, bubbly, caring, thoughtful, fun-loving, warm, welcoming, smiling – but perhaps the one which best describes her is special. To those who came into contact with her, she was special in every way and she made everyone around her feel special too. Bonnie is well-remembered at FASFAA conferences for making every event more fun; for making new people feel welcome and comfortable; for extending herself even at the expense of her own well-being; for her love of dancing; and her role in arranging the most enjoyable social events at conferences.

Her life was too short. She became ill while traveling to the NASFAA annual conference in 1994 and within seven weeks she was gone from the lives of all who knew her. Although her illness was sudden, those few weeks enabled her friends and colleagues to express to her how much she had meant to them. She received literally hundreds of cards, letters, and gifts from her financial aid "family." Colleagues from several states traveled to South Carolina for a memorial service in her honor. She had touched the lives of so many individuals who felt her loss so greatly and there was a tremendous outpouring of sympathy.

Because of her extensive role in education, many of her friends and colleagues wanted to remember her through a scholarship program. Many donations were made to a scholarship program, which benefits Brenau College nursing students. In fact, the Vice President who acknowledged the gifts noted that in twenty years he had never seen such an outpouring of memorial gifts in one person's honor. FASFAA also wanted to honor Bonnie in some way because of her outstanding contribution to the association and to students. The establishment of the Bonnie L. Pirkle Memorial Scholarship Program

was met with a standing ovation from members that Bonnie's memory will be kept alive by helping deserving students.

Bonnie Pirkle left behind her parents, Laurie and Jesse Long, her siblings Linda and Steve, and her children, Chris and Robert and their families, and a host of friends who considered themselves her extended family. She touched the lives of everyone who knew and loved her – from students who benefited from her personal attention and wisdom; to colleagues she welcomed to association activities; to today's financial aid leaders she taught at workshops; to friends who enjoyed being with her. Bonnie's spirit resides in every FASFAA member whose life she touched.

Mission Statement

The Florida Association of Student Financial Aid Administrators as a commitment to provide, from its own resources, financial assistance to enable deserving students to benefit from higher education, established the Bonnie L. Pirkle Memorial Scholarship. The scholarship was also created as a means of recognizing the FASFAA President's institution for his or her service to the association. The scholarship was named in honor of Bonnie L. Pirkle, a long-time FASFAA member who exemplified the highest personal and professional qualities and who embodied the spirit of camaraderie of financial aid administrators in Florida. As a memorial fund, the scholarship also honors assistance and thereby fulfill their educational goals. FASFAA hopes that the awarding of this scholarship will also increase the visibility and enhance the image of financial aid administrators in the State of Florida.

FASFAA

April 18, 1997

Mr. John Smith
123 Merryweather Drive
Orlando, FL 32578

Dear Mr. Smith,

On behalf of the Florida Association of Student Financial Aid Administrators (FASFAA), I would like to offer my sincere appreciation for your contribution of \$50.00 in remembrance of Bonnie L. Pirkle.

We will credit your gift to the **Bonnie L. Pirkle Memorial Scholarship**, which will, in perpetuity, provide scholarships for deserving students attending Florida institutions. As an association, we feel that this is a fitting tribute for a member who devoted her professional life to helping students.

Again, thank you very much for your generosity.

Sincerely,

Christine C. Bishop
Treasurer

Cb/

Enclosure

UNIVERSITY OF FLORIDA
Office for Student Financial Affairs

April 7, 1998

Dr. Catherine Cornelius, President
South Florida Community College
600 West College Drive
Avon Park, FL 33825

Dear Dr. Cornelius:

As Immediate Past President of the Florida Association of Student Financial Aid Administrators (FASFAA), it is my pleasure to inform you that the Bonnie L. Pirkle Memorial Scholarship will be awarded to Yvonne V. Ladner, a very deserving student who will be attending the Nursing Program at South Florida Community College. FASFAA is a professional organization of approximately 600 financial aid administrators from colleges and universities, as well as associate members from the lending community who participate in the Federal Family Educational Loan Program throughout the state of Florida. This scholarship is funded solely by members of this organization, and honors the late Bonnie L. Pirkle, a long time FASFAA member, who exemplified the highest professional and personal standards of a financial aid administrator.

The Bonnie L. Pirkle Memorial Scholarship also honors your own Wayne Bodiford, Director of Financial Aid at South Florida Community College, who serves as our current FASFAA President. This gift is intended as an expression of appreciation by the membership to both Wayne Bodiford for his outstanding contributions of time, talent and energy to the organization this year, and to South Florida Community College. The membership wishes to thank South Florida Community College for its contribution to the financial aid profession by supporting Wayne in fulfilling his responsibilities as President. Without that vital endorsement, the successes we have experienced this year would not have been possible.

A check for one thousand dollars (\$1,000), made co-payable to South Florida Community College and Yvonne V. Ladner will be forwarded to your business office after July 1, 1998, but no earlier than thirty days prior to the beginning of your fall term. Wayne will notify the FASFAA Treasurer of the date the check is to be drawn. Once again, on behalf of the Florida Association of Student Financial Aid Administrators, thank you for your continued support.

Sincerely,

Rick Wilder
Immediate Past President

FASFAA POLICY AND PROCEDURE MANUAL

7. AWARDS

SCHOLARSHIP ADMINISTRATION

Last Revision March 1997

Appendix 7.3.4

Page 1 of 1

Use of Color-Coded Levels of Giving

Following are some examples of how the color-coded levels of giving established in Policy 7.3 might be used in fund-raising activities and in donor recognition activities.

Since Bonnie Pirkle was known for using color-coded dots to organize her financial aid files, this system was designed with her in mind. It can be used to identify individual and corporate donors as appropriate.

- a. During a FASFAA conference, those who have purchased a raffle ticket for \$1.00 each could be given yellow stickers to wear during the conference, thus encouraging others to participate.
- b. At donor recognition activities at the fall conference, the color-coding scheme could be utilized to distinguish the various levels of giving.
- c. Special fund-raising events could use the color-coding scheme as part of the activity.

APPENDIX 7.3.5

**B. Pirkle Scholarship Fund
6/1/96 through 6/30/97**

Category Description	6/1/96 – 6/30/97
INCOME EXPENSE	
INCOME	
200 Reserve	
19,000.00	
201 Donations	50.00
202 Transfer	1,000.00
204 Interest	<u>598.19</u>
TOTAL INCOME	20,648.19
EXPENSES	
300 Award	<u>1,000.00</u>
TOTAL EXPENSES	<u>1,000.00</u>
TOTAL INCOME / EXPENSE	<u>19648.19</u>

APPENDIX 7.3.6

Bonnie L. Pirkle Memorial Scholarship

Name _____
Position / Title _____
Organization / College _____
Mailing Address _____

Phone _____ Fax _____

I want to contribute to the Bonnie L. Pirkle Memorial Scholarship.
Enclosed is my donation amount of \$ _____

Are you a FASFAA member? ____ Yes ____ No
Would you like to have a receipt mailed to you? ____ Yes ____ No

Please make check payable to FASFAA. **Thank you** for your contribution.

FASFAA USE ONLY

Cash Received \$ _____
Check # _____ (I or P) \$ _____
Other _____ \$ _____
Total Received \$ _____

Date Received ____/____/____

Checked By: _____

Receipt Sent Y N ____/____/____

Thank You Sent Y N ____/____/____

APPENDIX 7.3.7

**Bonnie Pirkle Scholarship
List of Donors**

<u>Name & Address Donated</u>	<u>Amount Donated</u>	<u>Date</u>
Sylvia H. Robinson 3013 Huntington Drive Tallahassee, FL 32312	\$50.00	2/17/97

<LOGO HERE>	FLORIDA ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS
TAX DEDUCTION RECEIPT	
Name _____ contributed to The <i>Bonnie L. Pirkle Memorial Scholarship</i> Amount \$ _____ on Date ____/____/____	
_____ FASFAA Treasurer FEIN: 59-243764	