

POSITION DESCRIPTION

Office: President

General responsibilities:

- A. The President shall be the principal executive officer of the Corporation and shall establish the direction of the Corporation for one (1) year.
- B. The President shall supervise the business of the Corporation and preside at all meetings of the Corporation and its Executive Committee.
- C. The President shall establish any and all committees within the commission structure and shall serve as an ex-officio member of all committees.
- D. The President shall act as official spokesperson for the Corporation or appoint, with prior approval of the Executive Committee, another individual to act as the official spokesperson.
- E. The President shall be the official ISFAA representative to the MASFAA Executive Council and the official ISFAA liaison to NASFAA.
- F. Contracts and agreements on behalf of the Corporation and approved by the Executive Committee must be signed by the President.
- G. The President shall perform all duties incidental to the office of the President and other duties as may be prescribed by the Executive Committee.
- H. Upon completion of the term of office, the President shall submit an annual report to the member representatives.

Specific responsibilities:

- 1) Plan and coordinate three to five Executive Committee meetings.
- 2) Serve as ISFAA voting delegate on the MASFAA Executive Council.
- 3) Represent ISFAA at the NASFAA Annual Conference and throughout the rest of the year.
- 4) Serve as the ISFAA contact point for various higher education organizations.
- 5) Ensure a smooth transition from President-Elect to President in the leadership of ISFAA.
- 6) Appoint commission directors (process can begin during president elect term) and assist commission directors with selecting committee chairs.
- 7) Responsible for the construction of the annual operating budgte (process can begin during president elect term).
- 8) Select recipient of President's Award and work with Chair of Nominations, Elections and Awards to order recognition plaque.

Tasks to complete responsibilities

1. Through the year-Monitor the activity of the five Commissioners and encourage them to direct the activities of committee Chairpersons.

2. Varies-Schedule ISFAA Executive Committee meetings.
3. Varies-Attend three to four meetings of the MASFAA Executive Council.
4. Three to four times a year (dates may vary)-Write article for each issue of the ISFAA Newsletter.
5. Attend NASFAA Conference as state representative.

Helpful comments: Time Commitment is approximately one (1) day per week.

POSITION DESCRIPTION

Office: President-Elect

General responsibilities:

- A. In the absence or temporary inability of the President to perform the duties of the Presidency, the President-Elect shall assume said duties. While acting as President, the President-Elect shall have all of the powers of the President and be subject to all of the restrictions placed upon the President.
- B. The President-Elect shall serve as Chair of the Audit and Finance Committee and the Bylaws Committee and shall appoint at least two (2) representatives to serve on each committee. (Traditionally the Delegate-at-Large representatives assist with both of these committees.)
- C. The President-Elect shall perform other duties as may be assigned by the President and/or the Executive Committee.

Specific responsibilities:

- 1) Ensure committee notebooks are transferred to new officers and committee Chairs.
- 2) Select commission Directors for vacant positions.
- 3) Serve as Chairperson of the ISFAA Executive Committee in absence of the President.
- 4) Assist commission Directors in selecting committee Chairs, in preparation for year of Presidency.
- 5) Maintain ISFAA position description notebook and update as needed.
- 6) Attend NASFAA Leadership Conference if approved by Executive Committee.
- 7) Assist President in filling vacancies in the Executive Committee, commission Directors, and committee Chairs.
- 8) Review fiscal policy for any updates
- 9) Review By-laws for any updates
- 10) Duties as assigned by the President.

Tasks to complete responsibilities:

1. December -January before taking office-Appoint Commission Directors. Appointed Commission Directors must be ratified by the membership as a part of the annual election.
2. February-April before taking office-Present ISFAA budget to Executive Committee.
3. February-March prior to taking office-Send out a volunteer form to the membership.
4. Meet with Past-Presidents as desired to get input for upcoming year.
5. Develop goals of ISFAA for upcoming year as President.

Calendar:

- January- Meet with Past-Presidents for input for upcoming year, if desired.
- February- Send Volunteer forms.

- December-January-Select commission Directors.
- March-April- Help commission Directors fill committee Chair positions for upcoming year.
- March-Order plaque for outgoing President
- April- The President-Elect will assume the responsibilities of President at the regularly scheduled Spring conference meeting, give Presidential Address, and provide gavel plaque to outgoing President.

Helpful comments:

Refer to Audit and Finance and Bylaws committee responsibilities for chair duties of these two committees.

POSITION DESCRIPTION

Office: Past President

General responsibilities:

- A. The Past President shall assist the President as requested by the President and/or the Executive Committee.
- B. The Past President shall serve as Chair of the Nominations/Elections and Awards Committee.
- C. In the absence or inability of both the President and the President-Elect to perform the duties of the Presidency, the Past President shall assume said duties. While acting as such, the Past President shall have all the power of the President and be subject to all of the restrictions placed upon the President.

Specific responsibilities:

- 1) Attend Executive Committee meetings.
- 2) Coordinate completion of Annual report.
- 3) Order all awards for yearly awards presented, except outgoing President's plaque.

Helpful comments:

Refer to Nominations/Elections and Awards committee responsibilities for chair duties of this committee.

POSITION DESCRIPTION

Office: Treasurer

General responsibilities:

- A. The treasurer shall perform fiscal management duties as directed by the Executive Committee.
- B. The Treasurer shall maintain records of the fiscal activities of the Corporation, with primary responsibility for accounts-payable records, and will submit a report of the activities at each business meeting and as requested by the President and/or the Executive Committee.
- C. The Treasurer shall submit an annual report of the fiscal activities of the Corporation to the representatives.

Specific responsibilities:

- 1) Pay incoming bills and reimburse members' expenses as necessary; deposit income if needed.
- 2) Complete tax forms and tax-exempt status forms.
- 3) Maintain financial records and prepare reports when needed.

Tasks to complete responsibilities:

- 1. Collect information for Archivist and present this to Archivist.

POSITION DESCRIPTION

Office: Treasurer-Elect

General responsibilities:

- A. In the absence or temporary inability of the Treasurer to perform the duties of Treasurer, the Treasurer-elect shall perform fiscal management duties as directed by the Executive Committee.
- B. The Treasurer-elect shall maintain accounts-receivable records of the fiscal activities of the Corporation and submit a report of the activities to the Treasurer to be included in the Treasurer's report at each business meeting and as requested by the President and/or the Executive Committee.

Specific responsibilities:

- 1) Deposit all income
- 2) Maintain financial records and prepare reports when needed.
- 3) Attend NASFAA Leadership Conference if approved by Executive Committee

Tasks to complete responsibilities:

1. Collect information for Archivist and present this to Archivist.

YEAR END AUDIT AND FINANCE FISCAL AUDIT GUIDELINES

(Used by Treasurer, Treasurer-Elect and Audit and Finance Committee)

The Treasurer should arrange to have all fiscal records available for review.

- Cash receipts
- Cash disbursements
- Monthly budgets
- CD interest statements
- Copy of ISFAA Fiscal Policies and Procedures

Tasks to conduct the audit are:

1. Sample monthly bank statements and review for accuracy and timeliness.
2. Document invoices to insure proper record keeping for reimbursements. (Two ISFAA signatures are required for reimbursement.)
3. Check endorsements to insure the proper committee Chair has signed Request for Payment forms.
4. Review gross income. If income is less than \$25,000, a tax return does not need to be completed due to ISFAA's non-profit, tax-exempt status. Review tax exempt status. Review tax exempt form; it should be filed by January on a bi-annual basis.
5. Randomly review bank deposits to document accuracy and itemization of all income.
6. Compare a random sample of check copies to entries in the checkbook for accuracy.
7. Review certificates of deposit.
8. Review a sample of the general ledger to insure accuracy of entries.

POSITION DESCRIPTION

Office: Secretary (2 year term)

General responsibilities:

- A. The Secretary shall send notices of meetings as directed by the President.
- B. The Secretary shall record minutes of the meetings of the Corporation and the Executive Committee. At the following meeting, the previous meeting notes will be presented, possibly amended and once approved will be posted to the ISFAA website.
- C. The Secretary shall maintain a file of the above-mentioned minutes via the ISFAA website.

Specific responsibilities:

- 1) To attend each Executive Committee meeting, record the minutes, and present them for approval at the next Executive Committee meeting. Once approved, they will be posted to the ISFAA website.
- 2) To attend the Business Meeting at the Fall and Spring conferences and record the minutes from each. The conference meeting minutes for winter will be presented at the following spring conference for approval while spring minutes will be presented for approval at the winter meeting. Arrange for the minutes to be included for review at the next conference.
- 3) Prepare stationary for elected executive comment and post it to the website.
- 4) To arrange for a substitute to record minutes, if not able to be present at any executive committee or business meeting.
- 5) Keeps the ISFAA official seal.

Tasks to complete responsibilities:

1. Executive Committee minutes should be recorded; presented at the following executive committee meeting; if amendments are necessary, re-write and post within one week to the ISFAA website.
2. Business Meeting minutes should be recorded; presented at the following Business Meeting; if amendments are necessary, re-write and post within one week of the Business Meeting to the ISFAA website. Arrange with the Site Chairperson to have them available at the next conference.
3. Stationary is to be created once the new Executive Committee is approved and posted to the ISFAA website.
4. Processes the ISFAA official seal.

POSITION DESCRIPTION

Office: Delegate-at-Large

General responsibilities:

(None listed in by-laws)

Specific responsibilities:

1. To serve as a member of the Executive Committee and handle other duties as assigned by the President.
2. Attend Executive Committee meetings.
3. Bring ideas from peers as needed.
4. Take ideas to peers as needed.

Helpful comments:

Serve on Audit and Finance Committee or Bylaws Committee.

Be a committee member on one or more additional committees as time permits.

Be available to become involved as necessary or when asked by the President. Delegates-at-Large may be asked to serve as a Representative, investigate issues, or attend special functions.

POSITION DESCRIPTION

Office: Internal Operations Commission Director

General responsibilities:

- A. Internal Operations Commission Director has the responsibility for managing the general activities of the Corporation as related to finance, archive, membership, voting, By-Laws and other areas as necessary for the stability and growth of the Corporation.
- B. The Commission Director will be responsible for coordinating the efforts of all committees under their jurisdiction and shall work with the President to establish committee goals and objectives for the year.
- C. The Commission Director shall be responsible for securing committee Chairs for committees under the commission. The President-elect is expected to help with this task.

Specific responsibilities:

1. Contact and solicit potential Chairpersons for each committee.
2. Committees: Audit and Finance, Membership and Ethics, Nominations, Elections and Awards, Archives, New Professional and Mentoring, and By-Laws.

Tasks to complete responsibilities:

1. Keep in contact with committee Chairs and insure committee reports are submitted via the website reporting system prior to each executive committee meeting.
2. Provide guidance to Chairpersons on policy and procedure matters.
3. Collect information for Archivist and present this to Archivist.
4. Prepare an annual report of all committee activities that is shared at the Spring conference business meeting.

POSITION DESCRIPTION

Office: Audit and Finance Committee

General responsibilities:

- A. Audit and Finance Committee shall consist of at least four (4) members including the President-Elect, who shall serve as Chair, the Treasurer, and the Treasurer-Elect.
- B. The Audit and Finance Committee shall be responsible for the fiscal credibility of the Corporation through an annual review of the accounting procedures and pertinent records; and other activities that ensure the financial stability of the Corporation.
- C. The Audit and Finance Committee will be a part of the Internal Operations Commission.

Specific responsibilities:

1. Audit year-end financial records in June following the fiscal year end.
2. Provide written year-end report to Executive Committee.
3. Complete annual committee report for and submit to commissioner prior to Spring Meeting.
4. Review Fiscal Policies and Procedures. Suggest changes as needed to Executive Committee.

Tasks to complete responsibilities:

1. Refer to audit guidelines to conduct annual audit.

Calendar:

1. June- Full committee meets to examine books.
2. July- Written report to Executive Committee.
3. February-Meet to develop upcoming year Fiscal policies and procedures.
4. March-Present updated Fiscal policies and procedures to Executive Committee for approval.

Helpful comments:

Work closely with Treasurer and Treasurer-Elect.

JOB DESCRIPTION for Accountant

The Indiana Student Financial Aid Association is a non-profit, professional association of approximately 250 members. Income consists of dues, meeting registrations, sponsorship, and interest from checking account and investments. Expenses consist of reimbursement to members for travel, printing, postage, supplies, etc. and bills from vendors for services and supplies. Approximately 250 transactions occur each year. The fiscal year runs from May 1 to April 30.

Duties to be assigned to the Accountant include, but may not be limited to:

1. File tax returns when necessary.
2. File tax-exempt status forms.
3. Recommend changes in record keeping and reporting.

POSITION DESCRIPTION

Committee: Nominations, Elections and Awards Committee

General responsibilities:

- A. This committee shall consist of three (3) members including the Immediate Past-President, who shall serve as Chair.
- B. Nominations, Elections and Awards Committee shall be responsible for conducting a fair and equitable nominations and election process, including the presentation of a slate of candidates for the elected office and the supervision of the election.
- C. Nominations, Elections and Awards Committee shall select individuals that have been or are currently members of ISFAA for recognition of outstanding service to the Corporation and to the Financial Aid profession. Responsible for recognizing members for Distinguished Service, New Professional and Retirement Awards.
- D. This committee shall be a part of the Internal Operations Commission.

Specific responsibilities:

- 1) Meet and select nominations committee.
- 2) Solicit nominations for officers.
- 3) Prepare and email ballot and tabulate results.
- 4) Notify all candidates regarding the election results.
- 5) Conduct award selection process and purchase all plaques for recognition awards.

Tasks to complete responsibilities:

1. Select two other committee members.
2. Develop timetable for election, Executive Committee approval, emailing of ballots.
3. Develop requests for nominations either in Newsletter or separate mailing.
4. Ensure ballots are available to voting members at least 45 days prior to our annual spring meeting.
5. Hold election for a minimum of two weeks, but ensure election is completed at least 30 days prior to our annual spring meeting.

POSITION DESCRIPTION

Committee: By-Laws Committee

General responsibilities:

- A. Maintain and reprint official By-Laws as required. Respond to proposals by the Executive Committee regarding changes or refinements in the By-Laws. Present proposed changes to membership for comment prior to final vote.

Specific responsibilities:

- 1) Maintain official copy of ISFAA By-Laws.
- 2) Reprint for membership as needed.
- 3) Review proposed changes and provide specific language required to achieve such changes for review and approval of membership.

Tasks to complete responsibilities:

1. Meet as required to read and review bylaws yearly and recommend updates/changes.
2. Re-write specific sections of By-Laws to achieve proposed changes and present re-writes to Executive committee for approval and then present them to membership for discussion prior to a vote.
3. Present to membership for a vote. Tabulate voting results and update bylaws as approved.

POSITION DESCRIPTION

Committee: Archives

General responsibilities:

- A. To maintain the official records of ISFAA.
- B. Provide historical information to the membership as requested.

Specific responsibilities:

- 1) Serve as a permanent storage for ISFAA records.
- 2) Determine which records to retain and which to discard.
- 3) Provide archival material to members and others as needed.

Tasks to complete responsibilities:

- 1. Collect ISFAA records throughout the year and at the end of each year, as they become available.
- 2. Keep Executive Committee informed periodically as to the status of the archives.
- 3. Provide information to the membership periodically to give them a sense of ISFAA's history.
- 4. Determine list of items to be placed in archives and distribute list to all committee chairs at the Presidential retreat.

POSITION DESCRIPTION

Committee: Membership and Ethics Committee

General responsibilities:

- A. The Membership and Ethics Committee shall consist of three (3) members.
- B. The Membership and Ethics Committee shall be responsible for all matters concerning recruitment, and retention of members.
- C. The Membership and Ethics Committee shall be responsible for sending annual membership renewal reminders by May 1st.
- D. The Membership and Ethics Committee shall maintain membership records.
- E. The Membership and Ethics Committee shall be responsible for the promotion and evaluation of ethical financial aid practices and the maintenance of professionalism among members.
- F. The Membership and Ethics Committee shall be a part of the Internal Operations Commission.

Specific responsibilities:

- 1) Maintain official database of the membership, ensuring members have the correct affiliation and voting status.
- 2) Distribute renewal application email to members on an annual basis.
- 3) Solicit new members and supply them with application instructions as needed.
- 4) Recommend membership fees to Executive committee in March/April each year.
- 5) Provide membership status report for each Executive committee meeting.

Tasks to complete responsibilities:

1. Review and update the application for membership on the web for each year.
2. Research other association dues to recommend yearly membership rates to Executive committee.
3. Maintain membership statistical report on a monthly basis to provide for Executive committee reporting and a year to year comparison.
4. Maintain a list of non-participating institutions and their primary contact to continue promotion and recruitment of their participation in ISFAA.

POSITION DESCRIPTION

Committee: New Professional and Mentoring

General responsibilities:

The New Professional and Mentoring committee is focused on welcoming new members to the state association and encouraging them to get involved by volunteering with the association.

Specific responsibilities:

- 1) Connect with new professionals in the state of Indiana.
- 2) Encourage members to get involved in the association.
- 3) Develop mentoring programs for the association.

POSITION DESCRIPTION

Office: Public Relations and Communications Commission Director

General responsibilities:

- A. Public Relations and Communications Commission Director shall coordinate the activities that communicate issues, ideas, and information to the representatives. It will also foster and promote financial aid awareness activities that assist in the dissemination of financial aid information to students, parents, high school counselors/personnel, admissions personnel, and the general public.
- B. The Commission Director will be responsible for coordinating the efforts of all committees under their jurisdiction and shall work with the President to establish committee goals and objectives for the year.
- C. The Commission Director or President shall be responsible for securing committee Chairs for committees under the commission. The President-elect is expected to help with this task.

Specific responsibilities:

1. Contact and solicit potential Chairpersons for each committee. Make contact with existing Chairpersons to determine needs.
2. Committees: Financial Aid Nights, Early Awareness, Technology, College Goal Sunday, High School Counselor Workshops, Newsletter, and IACAC.

Tasks to complete responsibilities:

1. Keep in contact with committee Chairs and insure committee reports are submitted via the website reporting system prior to each executive committee meeting.
2. Provide guidance to Chairpersons on policy and procedure matters.
3. Collect information for Archivist and present this to Archivist.
4. Prepare an annual report of all committee activities that is shared at the Spring conference business meeting.
5. Schedule and initiate monthly conference call with chairs.
6. Create/ update calendar with dates of all committees to keep on track
7. Create/update DropBox
8. Update position descriptions (calendar, to do list, duties)
9. Bi-annually evaluate visions in line with ISFAA strategic plan/mission.

Calendar: N/A

Helpful comments:

1. Vision: To communicate regularly with college goal Sunday, counselor workshop, financial aid nights, IACAC, newsletter, technology, and early awareness to ensure goals are being met and determine how the committees can work together to better educate potential and current students, guidance counselors, and others on the financial aid process.

2. Continue to improve processes, events, and communication to continue financial literacy across Indiana.
3. Create agenda for conference calls
4. Schedule conference calls
5. Create Drop Box (position description, calendar, HS Counselor List, dates FA nights, counselor workshop dates)

POSITION DESCRIPTION

Committee: Counselor Workshops

General Responsibilities:

- A. Contact everyone by June 10 for sites
- B. Organize, plan, and schedule high school counselor/agency counselor workshops to cover the financial process and the aid forms.

Specific Responsibilities:

- 1) Get topics from _____ by _____
- 2) Locate institutions of higher learning willing to host the workshops through an application process.
- 3) Locate financial aid administrators who are willing to conduct area workshops (minimum of two presenters per workshop).
- 4) Work with Mary for topics for IACAC to not duplicate
- 5) Make available on line all materials necessary for the workshops. The materials will be posted to the ISFAA website prior to the workshops and the attendees will be notified at the time of registration that they will need to print them prior to coming to the event.
- 6) Committee Chair will work with Technology to post site locations and registration information on the ISFAA website.
- 7) Contact ISFAA President for NADFAA materials for workshops. President receives information late August.
- 8) Contact schools good to host (historically proprietary schools have not been successful)
- 9) Send packets to all sites w/paperwork needed (evaluations, CGS info, sign in sheets)
- 10) Conduct "Train the Presenters" workshop conference call. Workshop will go over materials used for workshops and give helpful hints to present materials. All sites are required to have someone from school participate in call. (2 to make sure everyone attends)
- 11) Collect statistical information after workshops (site, presenter/counselor evaluations, and number of attendees).
- 12) Create evaluation and compile results to include in yearly report.
- 13) Compile year-end report for chairperson of Executive committee.
- 14) Coordinate workshops with college "go" week (possible week before)

Tasks to complete responsibilities: N/A

Calendar:

- April: Begin organizing sites and presenters
- September: Package and mail materials. Workshops are scheduled for late October- early November
- April: Take bids for locations to host workshops (by application)

- May: Decided who is going to host workshops
- June: Provide host information to SSACI
- June 10: Contact members for sites for workshops
- August: Line up presenters and start working on presentation
- September: Contact President of ISFAA for NADFAA materials
- September: Prepare for the mailing of the materials to sites (evaluations, CGS information, sign in sheets, etc.)
- September: Post online materials for workshops
- September: Have a conference call for all site host
- October: Contact IACAC committee for their presentation list to not duplicate
- October/November/December: Provide the onsite workshops
- January: Plan a webinar to host with FAFSA updates or as a refresher

Helpful comments:

- Vision: To offer a workshop to guidance counselors across the state to provide guidance about new, changing, and important financial aid information.
- Website: <http://www.isfaa.org/docs/counselors/CounselorWorkshopInfo.html>
- Work on high school counselor list with IACAC & Financial Aid Nights
- Plan Webex (if ASA does not help)
- Committee: 2 chairs & 2-3 members; committee members will be renewed/changed annually

POSITION DESCRIPTION

Committee: Financial Aid Nights

General responsibilities:

- A. To establish network of ISFAA volunteers to present financial aid workshops to the public, generally at high school financial aid night functions throughout Indiana.

Specific responsibilities:

1. Identify Regional Coordinators
 - a. Send email/call all coordinators October to verify volunteer interest Explain importance of communication if no response reach out to other members to fill void
2. Provide Coordinator's list and financial aid guidelines to high school counselors
3. Provide Coordinator's list, suggest outline for presentations, and survey to membership of ISFAA
4. Create and maintain 3-4 P.P. for presentations that can be edited for statewide presenters

Tasks to complete responsibilities:

1. Contact and enlist Regional Coordinators
2. Post Coordinators on line with the High School Guidance Counselor Section
3. Create list of Indiana High Schools with presenters to all scheduled counselors/coordinators to verify/add/change
4. Review and re-write (as needed) workshop guidelines and tips for counselors.
5. Review and re-write suggested outline for presenters
6. After session, post presentations on line on our web site under High School Guidance Counselor Section
7. Survey of # of presentations and # of attendees
8. Email presenters to create what worked, what did not work, and helpful hints
9. Add Financial Aid Nights to calendar on ISFAA website
10. Create/maintain PowerPoint for High School Financial Aid Night presentation: small/medium/long (ask regional coordinator to help)
11. Send High School counselors evaluations (even if they contact presenter directly and not through ISFAA)

Calendar:

- September: Email high schools to get FA night dates/presenters
- October: Email to members to fill voids
- January – March: Email coordinators/list serve to get attendance numbers
- March: Email coordinators/list serve to complete survey (what worked/didn't work).

- March: Send numbers to CGS
- September: Update PowerPoint templates
- October: Contact coordinators to confirm interest for upcoming presentations
- November: Add FA nights to ISFAA Calendar
- December: Send appropriate information to coordinators or high schools (evaluations/CGS handouts)

Helpful comments:

- Vision: To effectively communicate financial aid information to parents and students new to the process.
- Website: <http://www.isfaa.org/docs/counselors/FANightsInfo.html>
- Create 3-4 PowerPoint templates for presentations (short/medium/long)
- Create survey for presenters; what worked, what did not
- Work with IACAC & Counselor workshop to create/update counselor list (email/phone)
- Email committee members to see if anyone wants to help create the PP template
- Committee: 1 Chair & members are regional coordinators; Committee is renewed/changed annually.

POSITION DESCRIPTION

Committee: IACAC

General responsibilities:

- A. To serve as ISFAA's liaison with IACAC
- B. Member of the IACAC Conference Committee

Specific responsibilities:

1. Reach out to current IACAC president with contact information. IACAC website is <http://www.iacac.net/>
2. Attend Conference Committee planning meetings.
3. Plan financial aid sessions for Congress.
4. Attend IACAC conference in the fall.
5. Work with counselor workshop to not duplicate sessions (& utilize events to establish useful sessions for both events)
6. Work with CGS, counselor workshop & financial aid nights for handouts for IACAC conference
7. Work with financial aid nights & counselor workshop to update High School Counselor Contact List

Tasks to complete responsibilities:

1. Attend three to four planning sessions beginning in January
2. Suggestions for financial aid sessions are generated from the committee, other ISFAA members, etc
3. Obtain speakers for financial aid sessions, handle arrangements (i.e.: audio/visual needs, etc.) at conference; serve as recorder for financial aid sessions, etc.
4. Once IACAC conference is over post presentations online under High School Guidance Counselors section

Calendar:

- January: Start attending planning Sessions for IACAC
- August: Work with counselor workshop, financial aid nights, and CGS to get handouts for IACAC conference
- October: IACAC Conference

Helpful comments:

- Vision: To bridge gap with admissions professionals by preparing presentations for IACAC conferences.
- Website: <http://www.isfaa.org/docs/counselors/IACAC.html>
- Build stronger relationship with IACAC/Admissions offices
- Create contact list for High School Guidance Counselors (work with financial aid nights)

POSITION DESCRIPTION

Committee: Technology Committee

General responsibilities:

- A. Maintain association website by serving as the liaison with the web development.
- B. Review information on website periodically to keep accurate and up to date information online.
- C. Create wire frame/ skeleton website & assign/maintain stewards
- D. Create, update and maintain Facebook page

Specific responsibilities:

1. Review website on an annual basis to update information (work with stewards).
2. Work with Executive committee to post necessary information when needed.
3. Keep important events listed on the website calendar
4. Contact stewards for pages to verify accuracy.
5. Monitor & be contact for Survey Monkey
6. Serve as contact for ISFAA members to update website information.
7. Assign stewards for pages to update/maintain pages ISFAA Survey, Look into App for Smartphones

Calendar:

- June: Evaluate/update/change committee members
- July: evaluate/establish next year goals
- July/September/November/January/March/May: Send email to stewards to review website and request appropriate changes

Helpful comments:

- Vision: To provide accurate and useful information to educate and promote ISFAA and financial literacy to students and ISFAA members.
- Website: <http://www.isfaa.org/docs/help.html>
- Create skeleton of website and assign stewards to all pages to monitor changes/updates
- Create “to do” guides for members (update) for mileage, list serve, meeting notes, etc.
- Create Facebook page
- Survey monkey account
- Ap for smart phones for evaluations
- Committee: 2 Chair & 2 Committee; Committee members renewed/changed annually (dependent on involvement success of website).

POSITION DESCRIPTION

Committee: Newsletter Committee

General responsibilities:

- A. The Newsletter Committee shall be responsible for the creation of the Association's newsletter- ISFAA Bits and Bytes
- B. This committee shall publish four issues of the newsletter each year. (Oct, Dec, Feb, May)

Specific responsibilities:

- 1) Select members to assist the Editor in collecting content and producing the newsletter.
- 2) Select four dates that the newsletter will be published and deadline dates for the submission of articles for each newsletter.
- 3) Develop general topics to be covered in each newsletter through dialogue with the President.
- 4) Submit articles to the President for approval before posting edition to the website.

Tasks to complete responsibilities:

1. After finalizing content plan decide and confirm writer of each article.
2. Contact potential writers a month before the article deadline to give them ample time to write and get the article to the Editor.
3. Share articles with the President and receive approval for each.
4. Notify commissioner or President (whomever agreed) to send out notification once newsletter posted on website
5. Send newsletter to the Technology Chair to post on the website.

Calendar:

- October/December/February/May: Newsletter distributed
- September/November/January/April: email writers to get articles submitted to chair

Helpful comments:

- Vision: To create a way to involve and educate ISFAA members with current topics and happenings with financial aid and members.
- Website: http://www.isfaa.org/docs/toc_newsletters.html
- Create small group for newsletter entry
- Layout
 - o Section 1: Current topic (conference?)
 - o Section 2: President's Perspective (Current ISFAA President)
 - o Section 3: Outgoing Thoughts

- o Section 4: Current Topic
- o Section 5: SFA News
- o Section 6: Executive Committee Member Focus
- o Section 7: Current Topic
- o Section 8: Current Topic
- o Section 9: A Look Back
- o Section 10: Comings and Goings (Sue Allmon)
- Committee: 1 chair & committee is anyone who wants to be involved; committee members renewed/changed annually.

POSITION DESCRIPTION

Committee: Early Awareness Committee

General responsibilities:

- A. The Early Awareness Committee is responsible for developing a proposal for early awareness initiatives in Indiana.

Specific responsibilities:

- 1) Define the target groups ISFAA wishes to address.
- 2) Develop a program to be implemented by all colleges and institutions for early awareness
- 3) Create/update PowerPoint over current/different hot topics for different institutions (2 year/4 year/private/technical, etc.)

Tasks to complete responsibilities:

1. Form relationship with IYI and Learn more

Calendar:

Helpful comments:

- Create PowerPoint over different topics (hot topics) to have available to members
- Poll members of what presentations that would help/they want
- Committee: 1 Chair and 3-4 on committee

POSITION DESCRIPTION

Committee: College Goal Sunday Committee

General responsibilities:

1. The College Goal Sunday Committee is responsible for the annual planning and execution of College Goal Sunday and related activities in the State.

Specific responsibilities:

1. Coordinates a detailed plan of the College Goal Sunday event including, but not limited to:
 - a) Fundraising
 - b) Grant Writing
 - c) Marketing
 - d) Site Selection
 - e) Site Coordinator recruitment
 - f) Volunteer recruitment
 - g) Providing data to College Goal Sunday, USA Funds
 - h) Attend National College Goal Sunday Forum
 - i) Update/maintain website
 - j) Determine style and color of sweat shirts/ t-shirts
 - k) Site coordinator retreat (every 2 years)
2. Works with a number of different agencies to deliver a successful College Goal Sunday event each other.
 - a) USA Funds
 - b) Lumina
 - c) Learn More
 - d) Division of SFA
 - e) ICHE
 - f) Other non-profit organizations
3. Presents the College Goal Sunday event at locations all across the state
 - a) Disseminate shirts; posters; surveys; scholarship entries; supplies to each of the 40 sites
 - b) Collect and evaluate data for event.
 - c) Facebook Campaign

- d) Coordinate with Financial Aid Nights, Counselor workshops and IACAC to have brochures at events
- e) College Goal Sunday Calendar

Tasks to complete responsibilities:

Calendar:

- June: Site Coordinator retreat
- Have brochures available
- August: Send brochures to IACAC committee
- September: Send brochures to counselor workshop committee
- November: Send brochures to financial aid nights committee
- Select colors for sweatshirt/t-shirt
- National College Goal Sunday forum
- Select College Goal Sunday date for following year
- January: Send evaluations and other paperwork/supplies to CGS sites
- February: College Goal Sunday
- Send site renewal forms to coordinators

Helpful comments:

- Vision: To educate potential and current students on the FAFSA process.
- Website: <http://www.isfaa.org/docs/counselors/CGS.html>
- Secure Funding
- Build committee (co-chair & additional school reps)
- Facebook campaign
- Work on CGS website
- Committee: 2 chairs & 5 committee members (SSACI Reps, School Reps); committee renewed/changed annually

POSITION DESCRIPTION

Office: Training and Development Commission Director

General responsibilities:

- A. Training and Development Commission Director has the responsibility for managing the general activities of the corporation as related to conferences, long-range site, training, and other areas as deemed necessary for the stability and growth of the Corporation.
- B. The Commission Director will be responsible for coordinating the efforts of all committees under their jurisdiction and shall work with the President to establish committee goals and objectives for the year.
- C. The Commission Director shall be responsible for securing committee Chairs for committees under the commission. The President-elect is expected to help with this task.

Specific responsibilities:

- 1) Committees: Winter Conference Program, Winter Program Site, Spring Conference Program, Spring Conference Site, Long-Range Site, and Training.

Tasks to complete responsibilities:

1. Keep in contact with committee Chairs and insure committee reports are submitted via the website reporting system prior to each executive committee meeting.
2. Provide guidance to Chairpersons on policy and procedure matters.
3. Collect information for Archivist and present this to Archivist.
4. Prepare an annual report of all committee activities that is shared at the Spring conference business meeting.

POSITION DESCRIPTION

Committee: Winter Conference Program Committee

General responsibilities:

- A. Convene the committee responsible for planning the Winter Conference program.

Specific responsibilities:

1. Establish general conference theme with President—July
2. Identify keynote speaker(s) and topic(s)—September
3. Determine number of workshops and topics to be covered—September
4. Identify workshop presenters—October
5. Prepare draft of agenda to be used on the website regarding the conference—usually online by mid-October. Present to Executive committee at September meeting.
6. Prepare final agenda/schedule to be distributed at the conference—mid-November
7. Plan and make initial arrangements for evening entertainment—September
8. Make final entertainment arrangements—late October
9. Inform Site Committee of relevant Program Committee plans as needed
10. Prepare all audio-visual needs and present them to site committee—November
11. Present thank you notes/gifts to all presenters—December
12. Prepare final report and present it to Executive committee at January meeting.

Helpful comments:

- The Chair should plan to convene the first committee meeting in late June or early July.
- The Committee is to work closely with the Site Committee.

POSITION DESCRIPTION

Committee: Winter Conference Site Committee

General responsibilities:

- A. The Site Committee is to prepare all arrangements with the hotel.
- B. The Site Committee is to prepare all printing.
- C. The Site Committee is to determine the registration fee for the individuals to attend the conference.

Specific responsibilities:

- 1) The Committee needs to prepare a budget including the registration fee. Present proposed budget to Executive committee at September meeting so they can determine conference registration fee.
- 2) The Committee is to select all meals and snacks for the conference.
- 3) The Committee is to prepare all materials for printing, including the registration packets.
- 4) The Committee is to arrange for all audio-visual needs.
- 5) Prepare conference evaluation, distribute, collect and collate results.
- 6) Prepare final report and present it to Executive committee at January meeting.

Tasks to complete responsibilities:

1. The Committee is to work closely with the Program Committee.
2. Set workable deadline.
3. Delegate to committee members.

Helpful comments:

Site Committee should be geographically close.

POSITION DESCRIPTION

Committee: Spring Conference Program Committee

General responsibilities:

- A. Convene the committee responsible for planning the Spring Conference program.

Specific responsibilities:

- 1) Establish general conference theme with President—November
- 2) Identify keynote speaker(s) and topic(s)—January
- 3) Determine number of workshops and topics to be covered—January
- 4) Identify workshop presenters—February
- 5) Prepare draft of agenda to be used on the website regarding the conference—usually online by mid-February. Present to Executive committee at January meeting.
- 6) Prepare draft of agenda/schedule to be distributed at the conference—mid-March
- 7) Inform Site Committee of relevant Program Committee plans as needed
- 8) Prepare all audio-visual needs and present them to site committee—March
- 9) Present thank you notes/gifts to all presenters—April
- 10) Prepare final report and present it to Executive committee at July meeting.

Helpful comments:

The Chair should plan to convene the first committee meeting in late November or early December.

The Committee is to work closely with the Site Committee.

POSITION DESCRIPTION

Committee: Spring Conference Site Committee

General responsibilities:

- A. The Site Committee is to prepare all arrangements with the site.
- B. The Site Committee is to prepare all printing.
- C. The Site Committee is to determine the registration fee for the individuals to attend the conference.

Specific responsibilities:

- 1) The Committee needs to prepare a budget including the registration fee. Present proposed budget to Executive committee at January meeting so they can determine conference registration fee.
- 2) The Committee is to select all meals and snacks for the conference.
- 3) The Committee is to prepare all materials for printing, including the registration packets
- 4) The Committee is to arrange for all audio-visual needs.
- 5) Prepare conference evaluation, distribute, collect and collate results.
- 6) Prepare final report and present it to Executive committee at July meeting.

Tasks to complete responsibilities:

1. The Committee is to work closely with the Program Committee.
2. Set workable deadline.
3. Delegate to committee members.

Helpful comments:

Site Committee should be geographically close.

POSITION DESCRIPTION

Committee: Long-Range Site Committee

General responsibilities:

This committee shall investigate possible meeting sites for ISFAA's winter and Spring Conferences.

Specific responsibilities:

Negotiate services and facilities to be provided to the Organization.

Tasks to complete responsibilities:

1. Visit various establishments and investigate the facilities for meetings.
2. Present various options to the Executive Committee with recommendations as to potential future sites at November meeting for the next year. Should present both the winter and spring conference sites at this meeting.

POSITION DESCRIPTION

Committee: Training Committee

General responsibilities:

- A. Coordinate all statewide training events sponsored by federal, state, and regional agencies (i.e.: DOE, NASFAA, MASFAA, Division of SFA, etc.).
- B. Develop and administer statewide training workshops to meet current needs of financial aid professionals.

Specific responsibilities:

- 1) Act as liaison with outside agencies in arranging for sites. Work with site personnel to provide set-ups, supplies, food, etc as requested by program sponsor.
- 2) Develop annual training agenda of ISFAA sponsored workshops, including NASFAA training.
- 3) Develop content for each ISFAA sponsored workshop. Support Staff Workshop held in even numbered years and Leadership Symposium held in odd numbered years.

Tasks to complete responsibilities:

1. Contact potential site hosts and decide on workshop site.
2. Advertise workshops through mailings to ISFAA membership.
3. Arrange for speakers.
4. Arrange for food for meal and breaks as appropriate.
5. Act as moderator at workshops as needed.
6. Collect registration fees and remit to ISFAA Treasurer. Coordinate online registration if used for training activity.
7. Arrange for payment to speakers, vendors, etc.
8. Keep appropriate fiscal records.

Helpful comments:

This committee has much potential to assist colleagues in keeping up to date with new developments in financial aid as well as to train professional support staff new to our profession.

POSITION DESCRIPTION

Office: Governmental Relations Commission Director

General responsibilities:

- A. Governmental Relations Commission Director shall serve as the liaison for the Corporation with local, state, and/or federal agencies/organizations that directly affect financial aid, institutions, and students.
- B. The Commission Director will be responsible for coordinating the efforts of all committees under their jurisdiction and shall work with the President to establish committee goals and objectives for the year.

Specific responsibilities:

- 1) Contact and solicit potential Chairpersons for each committee.
- 2) Committee: Governmental Relations.
- 3) Prepare annual position paper for Executive committee members to take to NASFAA leadership conference in Washington, D. C.

Tasks to complete responsibilities:

1. Keep in contact with committee Chair(s) and insure committee reports are submitted via the website reporting system prior to each executive committee meeting.
2. Provide guidance to Chairperson(s) on policy and procedure matters.
3. Keep in frequent contact with Indiana Commission for Higher Education Division of Student Financial Aid Associate Commissioner.
4. Collect information for Archivist and present this to Archivist.
5. Prepare two annual reports of all committee activities. One that is shared at the Spring conference business meeting and one for the Fall conference.

Helpful comments:

Establish working relationship with ICHE Division of Student Financial Aid Associate Commissioner.
Monitor state as well as federal activity.

POSITION DESCRIPTION

Committee: Governmental Relations

General responsibilities:

The Governmental Relations Committee shall monitor state and federal legislation

Specific responsibilities:

- 1) Monitor state and federal legislation; bring items of importance to the attention of the Commission and, when appropriate, ISFAA members.
- 2) Coordinate with ICHE Division of Student Financial Aid Associate Commissioner on items requiring feedback and input.
- 3) A member of the committee shall also sit on the MASFAA Federal Relations committee.

Tasks to complete responsibilities:

1. Call regularly scheduled and Ad Hoc meetings.
2. Write to membership to propose legislative responses as endorsed by Commission members.

POSITION DESCRIPTION

Office: Associate Member Commission Director

General responsibilities:

- A. Associate Member Commission Director shall serve as the liaison for the Corporation with agencies and vendors who provide sponsorship of the association. Also responsible for fundraising efforts of the association.
- B. The Commission Director will be responsible for coordinating the efforts of all committees under their jurisdiction and shall work with the President to establish committee goals and objectives for the year.
- C. The Commission Director shall be responsible for securing committee Chairs for committees under the commission. The President-elect is expected to help with this task.

Specific responsibilities:

- 1) Contact and solicit potential Chairpersons for each committee.
- 2) Committees: Pat Wilson Scholarship, and Sponsorship.

Tasks to complete responsibilities:

1. Keep in contact with committee Chair and insure committee reports are submitted via the website reporting system prior to each executive committee meeting.
2. Provide guidance to Chairperson on policy and procedure matters.
3. Collect information for Archivist and present this to Archivist.
4. Prepare reports of all committee activities that are shared at the Spring and Winter conference business meetings.

POSITION DESCRIPTION

Committee/Office: Sponsorship Committee

General responsibilities:

Coordinate exhibitor activities and sponsorship opportunities for sponsors and vendors.

Specific responsibilities:

- 1) Coordinate specific exhibitor and sponsorship activities with Program and Site Chairpersons for fall conference.
- 2) Coordinate sponsorship for ISFAA Newsletter and website.
- 3) Act as the liaison between sponsors/vendors and the following chairpersons: Program, Site, Newsletter and Membership.
- 4) Review, organize and continually update the list of potential and active sponsors/vendors and their primary contact for ISFAA activities.
- 5) Maintain a positive relationship with ISFAA sponsors/vendors.
- 6) Annually review ISFAA fee structure and options with other state financial aid associations within MASFAA and any other contiguous states.
- 7) Annually send reminder notification of ISFAA's Exhibitor and Business Partner Support Policies as well as the ISFAA Statement of Ethics and Professionalism to all active associate members.

Tasks to complete responsibilities:

1. Ongoing communication with fall conference Program and Site Chairpersons, as to the status of sponsorship (needs and current contracts).
2. Ongoing communication with sponsors as to what types of sponsorship are needed/available, site arrangements (physical accommodations for exhibit or refreshment/social breaks), written contract and payment procedures.
3. Ongoing updating of ISFAA sponsor/vendor list.
4. Write and email initial letter explaining ISFAA and the sponsorship opportunities available. Write and email follow-up letter to those who do not respond to initial letter.
5. Express thanks to sponsorship partners on behalf of ISFAA via any mode that is sufficient to complete the task.
6. Annual report listing participating sponsors/vendors, income from exhibiting and advertising, any additional comments/suggestions to assist with future activities.

Calendar:

- May – Initiate dialog with sponsors/vendors active in the prior year to solicit feedback regarding their experience as associate members of ISFAA during the past year. Discuss items such as the fall conference, advertising options, fee structure, and any other creative sponsorship options. Compile a report to discuss at Presidential retreat.

- June – Provide feedback to associate members regarding Presidential retreat discussion and gather any additional information to prepare final recommendations for initial executive meeting.
- July/August – Write and email initial letter to potential sponsors/vendors for ISFAA activities, specifically related to Fall conference needs.
- October/November – Communicate with fall conference Program and Site Chairpersons as to sponsorship status. Act as liaison between sponsors/vendors and Program/Site Chairs. Provide listing of fall conference sponsors and vendors for “Thank You” during program meeting and any advertisements allowed in registration packet.
- December – Coordinate exhibitor area at winter conference; create and distribute evaluation to sponsorship partners.
- February/March – send special invitation to associate members encouraging attendance at the spring drive-in conference.

POSITION DESCRIPTION

Committee: Pat Wilson Scholarship Committee

General responsibilities:

The Pat Wilson Scholarship Committee assists in the coordination of all fundraising efforts to benefit the Pat Wilson Scholarship fund.

Specific responsibilities:

- 1) Develop an annual plan to raise money for the Pat Wilson scholarship plan.
- 2) Coordinate an annual auction for the Winter conference.
- 3) Assist the President in the selection of the Pat Wilson scholarship recipient if requested.