



NATIONAL ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS
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COMMISSION AND COMMITTEE

HANDBOOK

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INTRODUCTION

This *Handbook* compiles information from several sources to provide you with a single document to assist you during your term on a NASFAA committee. As with each endeavor, we would appreciate your comments on the *Handbook* so we can modify and refine its contents to better assist committee members in the future. Please feel free to offer your suggestions and comments to Joan Holland Crissman in the NASFAA Office.

A BRIEF HISTORY OF THE NATIONAL ASSOCIATION

The National Association of Student Financial Aid Administrators (NASFAA) is a non-profit corporation of postsecondary institutions, individuals, agencies, and students. Prior to 1977, NASFAA was comprised of individual members who had the responsibility for the administration of student financial assistance at institutions of postsecondary education or members who were interested in promoting effective management of student aid funds.

A group of financial aid administrators from various sections of the United States met on October 24, 1966, to organize a national coordinating body to work with regional associations and serve as a voice for professional student financial aid administrators. It was agreed that each regional association would be represented by three persons and that the name of the organization would be "The National Student Financial Aid Council." At this organizational meeting three regional associations were represented, (MASFAA, SWASFAA, and SASFAA), as well as persons from other areas of the country. By 1969, the original three regional associations had been joined by EASFAA, RMASFAA, and WASFAA and the name of the organization was changed to the "National Association of Student Financial Aid Administrators."

The original Constitution and By-Laws of the Association provided for a National Council composed of three representatives from each of the six regions. This Council elected its own officers and served as the executive arm of the Association with power to develop and advocate policies beneficial to aid administrators and students. The Council immediately began programs of legislative advocacy, professional development, and beginning in 1971 for a period of time, held annual Leadership Conferences to promote the full recognition and status of the aid profession.

A Central Office and Placement Service was established in 1970. Information dissemination in the form of a *Newsletter* also began in 1970. This was followed in 1971 with the publication of *The Journal of Student Financial Aid*. These publications brought information to the attention of the membership, which was still essentially regionally based and state or institutionally oriented. In 1972, the NASFAA Office and Placement Service was relocated from Indiana to Washington, D. C. and a part-time Executive Secretary was employed.

NASFAA was incorporated as a social welfare organization in 1973. As a social welfare organization, NASFAA could contract as a legal entity, but it could not raise funds from foundations, even for its non-legislative advocacy programs. In an effort to provide research, training, and publication services to the financial aid community, the National Institute for Financial Aid Administration (NIFAA) was incorporated as a tax-exempt organization in 1973. In January, 1974, the National Association hired the Executive Secretary and an Administrative Assistant on a full-time basis. At the same time, the office was relocated in Washington, D. C. The Executive Secretary was also given the title of Executive Director of NIFAA which paid a portion of his salary and of the expenses of the Central Office. It became difficult to distinguish between the roles and responsibilities of the two organizations which had overlapping purposes, members, and directors. NIFAA enjoyed only limited participation through membership and was not able to achieve the kind of financial stability which would permit full realization of the research, training, and publication goals for which it had been founded.

The Association, in 1975, began to carefully examine its role, form of governance, type of dues structure, the relationship between NASFAA and NIFAA, membership alternatives, and the types of service which should be offered by the national, regional, and state associations. After several years of study of the reorganization issue, the members of the National Institute, in 1977, voted unanimously to dissolve the corporation and transfer all of its assets, liabilities, and activities to NASFAA, which had achieved tax exempt status as a nonprofit corporation. Also, by vote of over 84%, the members of NASFAA amended the Articles of Incorporation to change from individual to institutional membership for the 1977-78 membership year.

NASFAA has grown in prominence and vitality and has become the major Association with a full-time staff and a national reputation, a number of organizational speaking for financial aid interests before the Congress and Administration. As NASFAA has evolved from an entirely volunteer organization to a large institutionally-based alternations have occurred. Many of these changes reflect the theme of providing greater participation by the members of NASFAA. Some of the developments in bringing the Association to its present structure are the following:

In 1973, the size of the National Council was expanded to include six representatives-at-large elected by the Council. The National Council, in 1980, voted to increase to ten the number of representatives-at-large and reduce the number of regional representatives-at-large from three to two per region. At this time, the election of representatives-at-large was shifted to the total NASFAA membership.

In 1976, a change was made to allow the National Council to elect a President-Elect who was not at the time a member of the Council. This action broadened the number of individuals eligible to serve as President of the Association. A subsequent change, in 1978, provided for the election of the President-Elect by the entire membership beginning with the 1979-80 term.

To recognize the increased responsibilities being placed with the professional staff for the conduct of the affairs of NASFAA, the title of Executive Secretary was changed to Executive Director in 1978. In April, 1985, the National Council again recognized significant changes in the Association's structure by approving By-Laws changes to change the Executive Director's title to President and the President's title to National Chair. These By-Law changes were approved by Council in July, 1985 to take effect July 1, 1987.

Committees with similar characteristics were grouped into Commissions and commission directors appointed to oversee their work.

The procedure for selecting members of the Nominating Committee was changed in 1980. NASFAA members in each region now elect their representatives to this committee.

In November 1984, the National Council expanded the President's (Executive Director's) budget authority to allow for limited transfer of funds between specified budget categories.

At its April 1985 meeting, the National Council reviewed the roles and responsibilities of the elected and salaried leaders of the Association. The major change, adopted at that time, transferred the responsibility for carrying out the purposes of the association and the directives of the Executive Committee and the National Council, from the National Chair to the President.

In the Spring of 1986, NASFAA's membership voted overwhelmingly to change the Articles of Incorporation to reflect the National Council's role and title as a Board of Directors.

In 1994, the Board adopted a change to the Association's calendar to make the meeting held in conjunction with the conference the last Board meeting in a given year. Among other things, this action lengthened the amount of time committees have to complete their work each year.

PURPOSES OF THE ASSOCIATION

The purposes of NASFAA are outlined in the Articles of Incorporation and the By-Laws of the Association.

The purposes for which the corporation is organized are to:

1. Promote the professional preparation, effectiveness and association of:
 - (a) Administrators and counselors of student financial aid in institutions of postsecondary education, government agencies, foundations, and private and community organizations, and
 - (b) Others in institutions of postsecondary education, government agencies, foundations, and private and community organizations concerned with the support and administration of student financial aid.
2. Serve as a national forum, and act as a focus for the expression of views on matters relating to the development, funding and conduct of student financial aid.
3. Promote and encourage programs that provide for educational opportunity and full development of individual potential of students.
4. Serve effectively the interest and needs of students, institutions, government agencies and sponsors through coordination of plans and programs pertinent to student financial aid.
5. Assist educational institutions, foundations, government agencies, and private and community organizations to promote and develop effective programs of student financial aid.
6. Promote such systematic studies, cooperative experiments, conferences, and other related activities as may be desirable or necessary to fulfill the purpose of the corporation.

These purposes outline the common interest that NASFAA members share and in large part explain why people come together to form an association. They also are the principles or broad goals that guide the association in its various activities and actions. As broad as these purposes are, however, they still are directed toward the singular subject of student financial aid.

GOVERNANCE AND STRUCTURE

As a membership-based organization, an appropriate balance needs to be maintained between the elected officers and representatives, appointed commissions and committees, and its staff. The work of each of these must be mutually supportive through a through understanding of the roles and responsibilities of each.

The ultimate responsibility for the affairs of NASFAA rests with its membership. The membership delegates authority to act on its behalf to the Board of Directors and its officers. In turn, the Board of

Directors may assign responsibilities to the Executive Committee, commissions and committees, and the President to carry out the work of the Association. The President is responsible for staff activities related to the work of the Association.

BOARD OF DIRECTORS

The governing body of the Association is the Board of Directors which is responsible for establishing broad policies and for the general conduct of the affairs of the Association. Therefore, the role of the Board of Directors is one of planning, organizing, and directing the Association to achieve its purposes. The National Chair, National Chair-Elect, and Immediate Past National Chair are the elected officers, and must be institutional or affiliate members of NASFAA. The National Chair presides at all meetings of the Association and the Board, and appoints the commission directors and committee chairs.

The Immediate Past National Chair serves as Chair of the Nominations and Elections and the Association Governance Committees.

The President is an appointed officer of the Association. He or she is appointed by the National Chair and confirmed by the Board of Directors. He or she serves on the Executive Committee and Board of Directors as a non-voting member. The President is the chief executive officer of the Association, and is responsible for carrying out the purposes of the Association and the policies established by the Executive Committee and the Board of Directors. He or she is responsible for the ongoing working relationships with governmental personnel, other educational organizations, and private agencies that share the Association's purposes. He or she represents NASFAA at other associations' activities and sits on the Washington Higher Education Secretariat. He or she works closely with members of the Congress on student aid legislation and funding issues. The President appoints the Secretary and the Treasurer of the Association.

Two regional representatives, who must be institutional or affiliate members of NASFAA, are selected from each recognized regional association. Twelve National Representatives-At-Large, who must be institutional or affiliate members of NASFAA, are elected by vote of the institutional membership without regard to geographical location or regional affiliation. In selecting candidates for these positions, such factors as ethnic origin, gender, and type of institution are considered to ensure that, to the extent possible, the Board of Directors represents all sectors and characteristics of the membership. Up to four commission directors may be nominated by the National Chair and confirmed by the Board to sit on the Board in a non-voting capacity.

EXECUTIVE COMMITTEE

An Executive Committee acts as the “executive arm” of the Association to oversee the planning, organizing, directing, and implementing of NASFAA activities and policies. The Executive Committee reports to the Board of Directors and acts on behalf of the Board of Directors between meetings of the Board. This means the Executive Committee may take any action that the Board of Directors may take. The Executive Committee consists of the officers, four (4) national representatives-at-large, and six (6) representatives to the Board, one from each region.

NASFAA STAFF

In general, the role of the NASFAA staff is to manage the affairs of the Association, to carry out the policies of the Association, as approved by the elected officers and representatives, and to encourage and facilitate the work of the commissions and committees.

A considerable amount of assistance to committees comes from the staff of the Association. Staff are familiar with all the operations and policies of the Association, and are responsible for coordinating all committee activities to insure clearance on the Master Calendar, and that committee expenses are monitored, reimbursement forms for travel and other expenses are available for committee members, and any special projects, publications, or reports are submitted in a timely manner for distribution to the Board of Directors for action and final disposition.

COMMISSIONS AND COMMITTEES

NASFAA's commission and committee structure provides a mechanism for direct input from membership into the activities and the positions of the Association. It also provides a way for aid administrators to improve their knowledge and expertise in financial aid and enhance their leadership and decision making skills. The active participation of those individuals involved in administering student aid is essential to promoting NASFAA's goals.

The commissions and committees are constituted each year to address specific problems, issues, or associational activities which require considerable preparation, study, deliberation, or research for Board of Directors review and action. The Board of Directors, upon the recommendation of the National Chair, has the authority to appoint commission directors. Committee chairs are appointed by the National Chair. All commission and committee activities must be approved by the President, Executive Committee or Board of Directors since they must conform with Association policies and procedures.

The relationship of the commissions and committees to the officers, Board, and staff is significant. Commission directors are an extension of the office of the National Chair and serve as his or her advisors and assistants. They are responsible for the activities of the committees assigned to their commissions and rely heavily on the expertise of the committee chairs, committee members, and staff to develop policy statements, provide services to the membership through publications and meet assigned goals and objectives.

Meetings and Other Committee Activities

Committee chairs are responsible for notifying members of the committee of the date, time, and location of meetings. All meetings are held in the NASFAA office since that location has proven to be the most cost effective.

Decisions vs. Recommendations

The responsibility of commissions and committees is to address current issues of concern, find good alternative solutions, select the best course of action to be followed, and make recommendations to the Board of Directors. In addition, they are expected to be forward thinking in their approaches to the improvement of the administration of the financial aid programs. Many persons contribute to the formulation of policies, procedures, and projects, but final selection of a major plan or course of action is determined by the National Chair, President, Board of Directors, and Executive Committee. The authority to approve, disapprove, table, or send back to committee for further study any project, report, or activity is the responsibility of the National Chair, President, Board of Directors, and Executive Committee.

Speaking for NASFAA

Committee members, committee chairs, and commission directors are not authorized to speak or communicate policy decisions or statements on behalf of the Association, unless specific authority has been granted. The President is specifically authorized to carry out the purposes of the Association and the directives of the Board, and to communicate such to appropriate parties. Care should be exercised by committee members in any discussions or communication with the membership, outside organizations, federal agencies, or Congress, to ensure that such authority is not inaccurately interpreted.

Use of NASFAA Logo by Committees

In cases where written communications on behalf of the Association are approved to be generated by commissions and/or committees, the communication must be reviewed by the President to ensure consistency and appropriateness of the obligations of the Association.

COMMISSION

Purpose

The major purpose of a commission is to coordinate the activities of the various committees under its jurisdiction. Occasionally, a particular activity may be deemed of such importance that the commission itself is a committee and deals with only one subject area.

Responsibilities of a Commission Director

Commission directors have positions of significance in the volunteer structure of the Association. They are accountable for many facets of NASFAA activities. As the National Chair's designated representative, it is most important for each commission director to be aware of his/her role and to completely understand his/her delegated responsibilities. The responsibilities of a commission director are to:

Serve as liaison to NASFAA committees for the Board of Directors and the National Chair;

Serve as a non-voting member of the Board of Directors; representing the committees at meetings of the Board of Directors; participate in Executive Committee and Board of Directors meeting deliberations relating to committee activities;

Insure that committee chairs provide reports or other information that may be requested by the Board of Directors or the National Chair;

Oversee and clarify objectives for the committees and insure that committees are making progress toward the goals and objectives assigned by the Association Governance Committee and the National Chair;

Develop strategies and schedules to encourage and, when necessary, enforce committee work; assure responsibilities of chair and members are carried out;

Attend committee meetings, conference calls, etc. as required; assist committee chairs in carrying out the work of the Association; represent the National Chair at the committee meetings; serve as committee

chair at committee meetings in the unlikely event a committee chair is unable to attend the meeting;

Facilitate the coordination of committee work with the designated NASFAA staff person;

Report committee progress and significant issues to National Chair 3 or 4 days after each committee meeting;

Work with Association Governance Committee to monitor the progress of committees toward the goals and objectives of the Strategic Long-Range Plan;

Assist the committee chairs in providing orientation information to committee members;

Help the National Chair-Elect select qualified volunteers for committees. Provide recommendations to the Chair-Elect to assist in selecting volunteers; and

Be an assistant and advisor to the National Chair and perform other functions as assigned by the National Chair.

COMMITTEES

Purpose

Committees report to the National Chair through a commission director and are established for certain purposes to assist the Association to carry out some of its goals. Through committees, recommendations on positions and activities will be made to the Board of Directors. All committee activities are subject to approval by the National Chair, President, Executive Committee, or Board of Directors.

Most committees are organized under commissions with other committees that have similar functions. Thus, each committee chair reports to and coordinates the committee's work with the appropriate commission director and with the staff liaison. In turn, the commission director provides direction to the committees and reports to the National Chair, President, Executive Committee, and Board of Directors. On occasion, issues may need to be addressed that do not fall within the jurisdiction of one of the established committees. In such cases, the National Chair will usually appoint a Special Task Force to address the specific issue. The Task Force Chair and members are expected to adhere to all guidelines established for committee chairs and members.

Responsibilities of a Committee Chair

1. Work with the commission director to ensure that proposed goals and objectives are carried out.
2. Monitor assigned objectives including expected results and target dates for completion.
3. Develop a calendar of activities, meetings, and projects for review by the National Chair, the President and staff.
4. Call all meetings of the committee with sufficient advance notice for all parties, coordinated with the staff liaison and approved by the President; observe the calendar provided for planning committee meetings. Set dates for each meeting well in advance, and report the dates when selected to the staff liaison for inclusion on the Master Calendar. Meeting dates are not final until cleared by the President. He is responsible to coordinate the dates of all committee meetings. If

a conflict of dates exists, the President will work with the National Chair, committee chair, staff liaison, and commission director to resolve any conflicts. The agenda should be sufficient to warrant a meeting; if it is not, the meeting should not be held. Conference calls are often adequate when the agenda is insufficient to warrant a meeting.

5. As mentioned before, all meetings are held in the D.C. area in order to effectively use the NASFAA office resources and be cost effective. The NASFAA Conference room is available, but the schedule for that room is the responsibility of the President. In the event more than one committee wishes to use the conference room on the same dates, the first request will be placed on the master calendar and honored. The other committees will be assigned meeting space by the NASFAA staff, who will attempt to secure space at no charge. Costs for meeting space will be charged against the committee's budget.
6. Prepare, in conjunction with the Staff Liaison, and mail in advance (2 weeks prior to meeting date) the agenda and related materials to committee members, commission director, National Chair, National Chair-Elect, and staff liaison.
7. Record (or designate a committee member to write) minutes and distribute them soon after meetings to members of the committee, commission director, officers, and staff liaison (within 30 days of committee meeting).
8. Submit periodic committee reports and an annual report in accordance with a frequency and format determined by the National Chair.
9. Attend Board of Directors meetings upon request of the National Chair.
10. Identify and submit recommendations on policy questions, issues, or Association projects to the commission director for preparation for Board consideration.
11. Prepare, in consultation with the Commission Director and the staff liaison, articles on the committee activities for the NASFAA Daily News.

Special Duties and Considerations for a Committee Chair

As a committee chair, you have a significant responsibility for NASFAA's activities during the year. You have a unique opportunity to provide your leadership to the Association, and as you preside over your area of responsibility, the following items should be utmost in your mind.

1. NASFAA has a long-standing reputation for working hard and playing hard. While after business hour activities of the committees are encouraged, those activities should not deter from the conduct of the meeting or prevent the meeting from beginning on time each day.
2. Sensitive to the concerns of our members, NASFAA affirms the right of all individuals to function in an environment free of offensive behavior.
3. Spirited discussions are healthy. As chair, you should ensure that divergent ideas are encouraged and respected, that the meeting maintains its decorum, and that a sense of esprit de corps is achieved.
4. If a conflict between committee members should develop, consult with those members privately;

the commission director should be apprised and may be helpful in resolving a conflict. In the event a committee chair and commission director are unable to resolve a conflict, this matter should be referred to the National Chair.

Staff liaisons are assigned to your committee by the President and serve as his representative, in some cases he may attend your meeting. If any concern should arise over the role or performance of staff and attempts to resolve the situation have been unsuccessful, you should refer these concerns to your commission director who will discuss them with the President and the National Chair. If you feel the circumstances are such that you need to discuss your concern directly with the President, feel free to do so. As a committee chair, you should not discuss concerns with anyone else except the commission director, President, and/or the National Chair. The highest level of professionalism should guide your effort.

5. Please keep in mind that staff have many responsibilities and often serve as liaison to multiple committees. Therefore, the President and staff must set priorities for work to be accomplished within the framework of priorities identified by the Board of Directors. You must be mindful that time frames and work of your committee will be considered in concert with other priorities. The President will consult with the National Chair if unusual circumstances would prevent a project from being completed on schedule or a request from being fulfilled.
6. You will be expected to provide a report to your commission director prior to each Board of Directors and Executive Committee meeting. At the close of the year (prior to June 30) you will be expected to provide a summary of your committee's activities to your commission director in a format specified by the National Chair. If requested, you may need to attend a Board of Directors or Executive Committee meeting.

If it becomes necessary to request additional funds for committee meetings or activities, prepare the request according to the established procedures outlined in this *Handbook*.

Term of Office of a Committee Chair

A Chair is appointed for a one-year term, but may be reappointed. However, the Editor of the *Journal* is appointed for a five-year term and may be reappointed for one additional term.

Responsibilities of Committee Members

Each year a number of members volunteer for committee assignments. Obviously, not everyone can be assigned to a committee. Those who are selected are responsible for adhering to the goals of the Association and objectives of the committee, and for following the required guidelines.

1. Attend all committee meetings and participate in the deliberations. Notify the committee chair and the Staff liaison if circumstances prevent attendance at a particular meeting. It is usually necessary to guarantee sleeping room accommodations in advance for each meeting; therefore, committee members must notify the Logistics Coordinator immediately if they are unable to attend a meeting to ensure that room accommodations can be canceled without financial liability to the individual;
2. Adhere to deadlines for submission of committee assignment;
3. Review all agenda items prior to each meeting and come prepared for the discussions;

4. Serve as a secretary for a committee meeting if requested by the chair;
5. Utilize the most economical means of transportation when attending a meeting and promptly file a travel reimbursement request;
6. Arrange his or her travel schedule to be in attendance for the duration of the committee meeting and at such times as designated by the committee chair;
7. Carry out in a timely manner the assignments or duties requested by the committee chair; and
8. Seek out the input of other financial aid administrators not involved in the committee work; listen to divergent points of view; and make decisions and recommendations based on what is best for the Association, professional, institutions, and/or students.

Terms of Office for Committee Members

Where it is deemed essential for the work of the committee to achieve continuity, certain committees have been established with membership on staggered terms. In these instances, terms and their length will be clearly established and individuals appointed with the understanding of the length of the term. In other instances, terms are for one year or the life of the committee. Terms of office for committees are from July 1 through June 30. Special Task Forces are appointed only until their specified project is completed. Journal Board members are appointed for from 1-3 year terms at the discretion of the National Chair in consultation with the Editor. Nominations & Elections Committee members are elected, not selected, and serves a two-year term.

COMMITTEE ACTIVITIES AND BUDGETS

Every year, each committee is given a list of committee activities which includes the overall purposes of the committee and specific committee objectives which are based, in large part, on the Strategic Plan and the Annual Plan adopted by the Board of Directors. Any changes proposed by the committee must be submitted to the National Chair, President, and staff liaison soon after the beginning of the fiscal year. The objectives provide a means of evaluating the committee's work, and provides a schedule of activities which can be incorporated into the Association's Master Calendar.

The Association's operating calendar necessitates budget approval for the subsequent fiscal year at the spring meeting of the Board of Directors. Committee budgets are therefore established prior to the selection of the committees and the determination of their projects and activities. In most cases, the committee budget covers only travel and accommodations for meetings including travel, etc., for the commission director and staff when necessary. Printing and distribution of special reports or other material for the membership are covered under other budget categories, if the project has been approved. In some instances it may be necessary for the committee to request an increase to its budget according to the procedures outlined in the next section. At least quarterly, NASFAA's Treasurer will advise committee chairs of their committee's budget status. Interim budget reports may be obtained from the staff liaison.

Responsibility for Management of Committee Expenditures

The commission director and committee chair are charged with the responsibility of managing the funds approved for use by his or her commission or committee.

The NASFAA staff will assist the commission director and committee chair by maintaining a record of committee expenditures, providing periodic reports, and in reviewing and authorizing all expenditures to ensure consistency with established Association policies and procedures.

Miscellaneous expenses for supplies, printing, and telephone calls may be reimbursed by NASFAA if they are properly documented and relate directly to committee business. Expenses incurred in the implementation of approved projects that have been previously budgeted should be submitted to the NASFAA Office on a Miscellaneous Claim Form.

Procedures for NASFAA Committees to Request Increases to Committee Budgets

1. Letter from committee chair to the President stipulating:
 - 1.1 Initial committee budget for year;
 - 1.2 Expenditures to date;
 - 1.3 Remaining balance;
 - 1.4 Additional funds requested;
 - 1.5 A justification for use of NASFAA funds to increase committee's original budget authority;
 - 1.5.1 If expenses involve a meeting, a statement must be provided to justify the purpose of the meeting. In addition, a detailed agenda must be provided with a statement as to the desired outcome of the meeting. Specific estimates of the expected number in attendance, travel, lodging, per diem and other costs must be included.
 - 1.5.2 If expenses involve material purchase, conference call expenses, project costs, or any other non-meeting related expenses, the letter must detail these expenditures, provide cost estimates, and statements justifying their need in fulfillment of committee objectives.
2. The President, in consultation with appropriate staff, determines the merits of the request in terms of discretionary resources available, number of similar requests from other committees, particular relevance of the request in light of committee objectives specifically, and NASFAA goals generally,

When a determination is made, the President notifies the committee chair.

Project Development Fund

A Project Development Fund has been established by the Board of Directors to serve as the reserve for special project funding. Commissions and committees may apply for funding of projects from this source. Requests for Project Development Funds must be submitted in writing to the Finance Committee and must include a detailed proposal describing the project, a detailed budget and if necessary the results of a marketing analysis which demonstrates the need for such project. See Appendix 5 for the Sample Format. The Finance Committee reviews the request in terms of the financial status of the Fund and forwards the request to the Board of Directors for consideration based on the merits of the proposal.

Travel Guidelines and Reimbursement Procedures

Existing NASFAA forms and guidelines must be used for all approved expenses and be submitted to the NASFAA Office for final approval and payment. The staff will process payments that are clearly within the approved project activity. In the event of unusual circumstances, the situation will be called to the attention of the President, National Chair, or commission director for resolution.

It is recommended that committee members be reimbursed for expenses only if they are present for the duration of the meeting. The execution of this policy is left to the discretion of the committee chair. Exceptions may be approved in the case of an emergency or when prior approval has been obtained. Reimbursement forms should be submitted to the NASFAA Office within three weeks of the committee meeting. It is the responsibility of the commission director and committee chair to insure that all reimbursement requests for his or her commission or committee are filed on time.

The general policy of NASFAA with regard to travel is that the individual pay all expenses and file a reimbursement form. If a problem occurs in meeting an obligation to attend a meeting or function of the committee, advances may be obtained for extremely critical situations. The committee Chair should apprise the commission director of the situation and he or she will obtain special approvals as deemed appropriate through the staff liaison.

Since it is expected that committee members normally attend the National Conference, committee members will not be reimbursed for travel to committee meetings held in conjunction with the National Conference. Hotel and meal expenses will be reimbursed for any days prior to or after the National Conference that are required for committee business, if it can be reasonably expected that they would not have been incurred for conference attendance.

The following guidelines govern committee expenses.

General - Expenses associated with NASFAA activities must be filed on the appropriate expense form, which must be accompanied by required receipts for airline tickets, hotel bills, taxis, parking, meals, etc. Travel claims should be filed within three weeks of a meeting.

Meeting Location - NASFAA-sponsored committee meetings will be held at the National Office in Washington, D.C. A committee that wishes to hold a meeting outside Washington must provide sufficient information to demonstrate that costs for such a meeting are equal to or less than a comparable meeting in Washington.

Transportation-Airline - Committee members are asked to make flight reservations as soon as meeting dates are confirmed to obtain lower airfares. If a meeting has to be canceled, or an emergency occurs, the Association will cover the penalty costs involved.

When traveling by air, individuals shall travel coach class. Exceptions for first class travel must be approved in advance by the Treasurer.

Automobile - Reimbursement for the use of a private automobile will be at a rate approved by IRS. Normally, this amount may not exceed the cost of coach air fare. In circumstances when use of a car is preferred for personal reasons, reimbursement for mileage will be limited to the above.

Rental Car - Use of a rental car must be approved by the staff liaison or Treasurer in advance of its use.

Taxi or Ferry - Ground transportation to and from meeting/lodging facilities shall be approved, provided they are reasonable, but shall not include ground transportation costs for personal choice beyond the initial expenditure to reach the facility (for example, cab fares for dinner at a restaurant away from the facility when food is available at the hotel). All transportation costs must be supported by receipts. If parking charges are incurred, receipts must be submitted for charges in excess of \$3.

Other Travel - Reimbursement of costs for NASFAA committee members to attend NASFAA committee meetings scheduled to coincide with non-NASFAA meetings for individuals normally in attendance or with a regional or national conference will be limited to subsistence expenses incurred specifically for committee meeting attendance. For committee members attending meetings in conjunction with regional meetings outside of their regions, all travel expenses will be reimbursed. Reimbursement of committee members, who are regional representatives to the Board of Directors, for committee meetings, held in conjunction with a Board of Directors meeting will be limited to subsistence expenses required to participate in the Board meetings. For an exception to this policy, requests may be submitted to the President.

Hotel Accommodations - NASFAA staff will make hotel arrangements for committee members, except for meetings held in conjunction with the Annual Conference. Reservations will generally be made for the nights preceding each day of the meeting. Double rooms will be reserved for members. If different accommodations are requested, the difference in cost will be a personal expense. If a committee member's request for a single room or different accommodation results in another member having to be placed in a single room, he or she will be responsible for the full cost of his or her single room. If additional nights are required, or if individual plans change, members are required to contact the designated staff person as soon as possible to avoid paying for unused rooms.

Committee members who fail to advise the designated staff person of a change in schedule will be billed for any hotel expense incurred. If an individual chooses to make his or her own reservations and stay at another location, he or she may do so; however, reimbursement will be limited to the rate at the primary hotel. The guidelines for double room occupancy also apply in this situation.

Meals - If meals are provided at a NASFAA meeting, other eating arrangements will be a personal expense. In Washington, breakfast and lunch will generally be provided, and a dinner allowance of \$35.00 will be covered. For out of D.C. meetings, a \$55 per diem is allocated. If less than a full day is involved, the maximum will be prorated at \$10, \$10 and \$35. This maximum shall apply to all travel unless the staff has expressly agreed to increase the limit for certain meeting locations. Committee chairs or members who pay for a meal will be reimbursed at the appropriate per diem rate for the number of members in attendance. Receipts are required for meal reimbursement.

Tips - Reasonable tips to hotel and transportation personnel will be reimbursed. Tips for meals should be included in the costs of meals.

Telephone Calls – Only telephone calls for NASFAA business and one brief call home daily may be claimed. Please do not make these calls from hotel rooms unless you are using a credit card.

Miscellaneous Expenses - Any miscellaneous expenses above the \$3 allowance must be supported by receipts and itemized on the Travel Expense Claim Form. A reasonable length call home each day will be reimbursed.

Alcoholic Beverages – Costs for alcoholic beverages are a personal expense, not reimbursable by the Association.

COMMISSION AND COMMITTEE REPORTING POLICIES AND PROCEDURES

In order for the Board of Directors to be fully apprised of the activities of the commissions and committees, it is important that the following types of reports and communications be submitted on a timely basis. Adequate minutes must be kept of each meeting and subsequently distributed to the committee members, commission director, officers, and staff liaison. In order for the membership to be kept apprised of the work, accomplishments and other activities of NASFAA commissions and committees, each committee chair is expected to submit information summarizing committee activities periodically to the Editor of *Today's News* for possible inclusion. Through this communicative tool, both upward and downward information flow can be facilitated.

Periodic Reports for the Board of Directors

A written report must be submitted to the commission director and the staff liaison in advance of each meeting of the Board of Directors to assist the commission director in preparing his or her report to the Board. Therefore, the commission director will contact each committee Chair prior to each meeting of the Board of Directors requesting that a written report be forwarded to the commission director. It will be the responsibility of the commission director to develop a comprehensive commission report for dissemination to the Board.

Committee Reports should conform to the format demonstrated in the Appendices. For 2009-2010, the format for all committee reports is a narrative format that describes in detail all of the committee's activities and responds to each goal/objective. All reports should list each goal assigned to the committee and clearly identify in a narrative the steps the committee is taking to address each assigned goal. The Board of Directors is interested in knowing exactly what the committee did toward accomplishing the goal, and if no action was taken, an explanation should be provided. This goal-reporting format allows the Association Governance and Membership Committee to review committee activities at the mid-point and end of the year.

Committee Reports must conform to the formats outlined in Appendix 3. For 2009-2010, committee reports are due in the NASFAA office on the following dates: **October 23, 2009** for the Fall Board meeting; **January 22, 2010** for the Mid-year report; **April 23, 2010** for the Spring Board meeting; and **June 11, 2010** for the Final Report. Committee chairs are responsible for writing the reports and for ensuring that they reach the NASFAA office by these dates.

Occasionally, it may be necessary for the committee chair to attend the Board of Directors meeting to fully explain an activity. The National Chair will issue an invitation to the Chair when such attendance is required. Reimbursement for travel expenses will be charged against the committee.

Annual Report of the Committee

Committee chairs are charged with providing an annual report to the National Chair through the commission directors. The commission directors are responsible for the coordination of reports of the committees under their jurisdiction. As noted above, the 2010 annual reports are due on June 19, 2010. These reports may be included in such materials as the Annual Report of the Association which is prepared each year by the President, and are used to report the Committee's activities for the year to the Board of Directors. These are treated as official documents of the Association's activities and as such should accurately reflect what the committee actually did, as well as recommendations for the future.

Special Reports

From time to time, special reports may be necessary to address specific problems, goals, or issues. These types of reports are utilized to address concerns needing immediate resolution by the Executive Committee to finalize a directive or project activity previously addressed by the Board of Directors. The reports will be handled as necessary through the organizational structure.

GUIDELINES FOR CONDUCTING SURVEY RESEARCH

The Research Committee is responsible for coordinating and facilitating all survey research projects conducted by NASFAA committees or staff that involve mailings, electronic, or Web-based communication with the NASFAA membership or subgroups thereof.

To meet that responsibility, the Research Committee or individuals designated by the Committee shall review proposed surveys and provide technical assistance with scheduling, formulation of survey questions, response formats, mailing and follow-up options, file layouts, data editing and coding, statistical analysis, and reporting, as appropriate to the scope of the survey project and the needs of the group or individual conducting the survey. These procedures should be followed for surveys that are administered in paper, electronic, and/or Web-based formats.

In some instances, an immediate need to survey the membership or a subset of the membership may necessitate a quick review by research staff rather than a more thorough review under established procedures. An immediate need would be defined as one arising from unpredicted actions on the part of Congress, the Department of Education, or some other external organization. Committee activities would presumably have a longer planning period from conception of a project to survey administration.

Committee chairs are asked to contact the chair of the Research Committee or NASFAA research staff when a survey research project is being considered.

OUTSTANDING ACHIEVEMENT

In March, 1977, the Board of Directors approved procedures for recognition of the outstanding achievement of NASFAA commissions and committees. This was done in an attempt to provide visible recognition for the valuable work of the committee in supporting the objectives of the Association and to stimulate others to become involved in its activities. Thus, an award, an engraved plaque recognizing the outstanding committee of the year and its Chair, is presented at the National Conference. The National Chair of the Association has total discretion in the selection of the Committee of the Year Award. The original award plaque was donated by the West Virginia Association of Student Financial Aid Administrators and is on permanent display in the NASFAA Office. The Committee of the Year Certificates are given to members of the committee selected.

Recipients of the Committee of the Year Award to date are as follows:

- 1977 Committee on Program Review, Ruth Neve, Chair, Dallas Martin, Staff Liaison
- 1978 Commission on Training, Don Ryan, Chair, Dallas Martin, Barbara Anderson, Staff Liaisons
Title IV Committee, Don Holec, Chair, Special Award in recognition of work for legislative and regulatory advocacy, Dallas Martin, Staff Liaison
- 1979 Title IV Committee, Don Holec, Chair, Dallas Martin, Joyce Dunagan, Staff Liaisons
- 1980 Membership Committee, Thomas Rutter, Chair, Joyce Dunagan, Staff Liaison
Membership Committee Member, Mamie Smith - Georgia, Special Award for obtaining the

- largest increase in NASFAA membership from a state
- 1981 Long-Range Planning Committee, Lola Finch, Chair, Dallas Martin, Staff Liaison
Non-traditional and Proprietary Concerns, Dorothy Cann, Chair, Joan Holland, Staff Liaison
- 1982 Conference Program Committee, Rhonda Norsetter, Chair, Joan Holland, Staff Liaison
Conference Site Committee, Glenn O'Kray, Chair, Joan Holland, Staff Liaison
- 1983 Need Analysis Standards Committee, Larry Dietz, Chair, Joan Holland, Staff Liaison
- 1984 National Conference Committee, Robert Evans, Chair, Joan Holland, Staff Liaison
- 1985 Commission on Fiscal Planning and Management, Marc Brenner, Chair, Robin Jenkins, Staff Liaison
- 1986 Fiscal Planning and Management Committee, Marc Brenner, Chair, Robin Jenkins, Staff Liaison
National Conference Committee, Joseph Sciame, Chair, Barbara Kay, Staff Liaison
- 1987 Need Analysis Standards Committee, Paul Aasen, Chair, Joan Holland and Marty Guthrie, Staff Liaisons
- 1988 Minority Concerns Committee, Mariko Gomez, Chair, Rachel McCrae, Staff Liaison
Training Committee, Richard Battig, Chair, Barbara Kay, Staff Liaison
- 1989 Need Analysis Standards Committee, Natala Hart, Chair, Marty Guthrie, Staff Liaison
- 1990 Professional Development for Membership Committee, Patricia Stewart Harris, Chair, Barbara Kay, Staff Liaison
- 1991 Need Analysis Standards, Elizabeth Hicks, Chair, Marty Guthrie, Staff Liaison, Ken McNerney, Staff Assistant
Reauthorization Task Force, Marc Brenner, Chair, Marty Guthrie, Staff Liaison, Larry Zaglaniczny, Staff Assistant
- 1992 Association Governance, Donald R. Ryan, Chair, Joan Holland, Staff Liaison
Research Committee, Albert G. Hermsen, Chair, Tim Christensen, Staff Liaison
National Conference Committee, Janice Linfield, Chair, Barbara Gordon, Staff Liaison
- 1993 National Conference Committee, Paul Phillips, Chair, Barbara Gordon, Staff Liaison
- 1994 Research Committee, Deborrah Glenn-Long, Chair, Tim Christensen and Fred Franko, Staff Liaisons
- 1995 Finance Committee, John Parker, Chair, Sally Candon and Sharon Ferguson Staff Liaisons
- 1996 Electronic Services Advisory Committee, Lee Gordon, Chair, Jeff Sheppard, Staff Liaison
- 1997 Reauthorization Task Force, John Curtice, Chair, Larry Zaglaniczny, Staff Liaison
- 1998 Diversity and Multi-Cultural Issues Committee, Jennifer Douglas, Chair, Rachel McCrae and Sharon Ferguson, Staff Liaisons
- 1999 National Conference Committee, Rachael Lohman, Chair; Barbara Gordon and Connie McCormick, Staff Liaisons
Task Force on Standards of Excellence, Charles Bruce, Chair; Joan Crissman and Tim Christensen, Staff Liaisons
2000 Committee on Access and Choice, Susan Ladd, Chair; Marty Guthrie, Staff Liaison
- 2000 Electronic Services Committee, Patrick Kennedy, Chair; Ellen Blackmun, Jeff Sheppard, Eunice Powell and Roland Zizer, Staff Liaisons
- 2001 Training Committee, Catherine Breuer, Chair; Connie McCormick, David Futrell, and Stacey Peterson, Staff Liaisons
- 2002 Technology Initiatives Committee, Audrey Osswald, Chair; Ellen Blackmun, Roland Zizer, and Eunice Powell, Staff Liaisons
- 2003 Research Committee, Al Hermsen, Chair; Kenneth Red, Staff Liaison
- 2004 Leadership Development & Professional Advancement, Bonnie C. Joerschke, Chair; Barbara Gordon and Marty Guthrie, Staff Liaison
- 2005 Institutional Program Management, David Gruen, Chair; Ellen Blackmun and Stacey Moore, Staff Liaison
- 2006 Editorial Board of Student Aid Transcript, Linda Conard, Staff Liaison

- 2007 Association Governance & Membership, David Gelinas, Chair; Joan Crissman, Staff Liaison
National Conference Committee, Billie Jo Hamilton; Barbara Gordon, Connie McCormick and
Jennifer Jackson
- 2008 Research Committee, Meihua Zhai, Justin Draeger
Student Access & Diversity Committee, Jennifer Martin, Haley Chitty

APPENDIX 1

TIPS TO ORGANIZE YOUR YEAR AS A COMMITTEE CHAIR

Review your committee's charges and become familiar with already established long and short-range plans and association policies and procedures.

Develop your goals and objectives by incorporating the committee's activities with your own personal plans.

- Put your goals in order
- Develop a master plan
- Establish specific steps
- Schedule the steps in the best order
- Follow your schedule

Establish priorities by being realistic about what can be accomplished during your term.

Develop a schedule which includes timelines for accomplishing your committee's goals and objectives. This schedule should include a calendar for the committee's activities such as committee meetings, project deadlines, etc.

Make specific assignments to committee members as early in the year as possible.

Follow up in writing after each meeting with a reminder about the assignments and/or responsibilities agreed to by each committee member.

Establish a list of communication and reporting requirements for your committee. Be sure they understand what type of communications and reports you expect and when they are due, as well as the ones you expect to provide to the committee.

For your annual report, develop a system early in your tenure that will enable you to retain important facts that can later be compiled for your report.

Prepare a notebook to assist you in keeping track of committee records and documents. It should be indexed to include such things as: Agendas; Budget; Calendar; Committee Charges; Committee Members; Committee Reports; Correspondence; Minutes; Newsletters; Articles on the Committee's Activities; Notes; and Association Policy Memos.

Expand communications with your institutional supervisor. While you most likely obtained permission from your supervisor before you accepted your new responsibilities, it is extremely important to keep him or her advised throughout your tenure. An open and even expanded communication with your supervisor will go a long way toward helping him or her to understand your role and to know that you have not diminished your institutional responsibilities.

Involve your office staff in a positive way in your new role so they do not feel ignored, abandoned or imposed upon.

APPENDIX 2- GUIDELINES FOR CONDUCTING MEETINGS

Schedule the meeting with sufficient lead time to enable participants to attend.

Complete the Meeting Request Form and submit it to your staff liaison.

Notify participants of the date, exact location and time.

Disseminate an agenda and related materials, if appropriate, in advance of the meeting. If the agenda cannot be sent in advance, it should be distributed and reviewed at the beginning of the meeting.

Advise participants who will be called upon to give reports or address specific issues, what is expected and the approximate length of time they will be allotted.

Each committee must keep written minutes of its meetings. The chair is responsible for assigning an individual to take the minutes.

A rotating system in which a committee member is responsible for minutes for one day of each meeting has worked well in the past.

Staff liaisons should not be asked to take minutes.

Start the meeting on time, observe scheduled breaks and adjourn at the appointed time unless the participants agree to a different time.

Once the meeting has been called to order, keep it moving; encourage participation but discourage side conversations by asking that participants be recognized before they speak.

Establish a protocol for the meeting by advising participants of the parliamentary rules to be followed and the manner in which they may seek recognition to speak on an issue.

Be alert to the needs of those in attendance during the meeting.

Speak clearly. If you can't be heard, you can't exercise control. If you have a low speaking voice, rap for silence before you speak.

Insist on order. When general simultaneous discussions ensue, no one can be heard and nothing can be accomplished.

Make sure each individual talks clearly and audibly, interrupt if you must and have him/her repeat what was said if you have the least suspicion that some may not have heard him or her.

Sum up what the speaker has said and obtain a decision.

Stop aimless discussion by recommending further study.

Retain control, but don't stifle free comment. Invite constructive criticism and even disagreement. Ask for support. Clarify issues by obtaining a consensus, then move on.

Don't argue with the individual who has the floor. Ask questions if you disagree, but remember, as the presiding officer you are to be neutral.

If you have a comment, ask for the floor as a participant.

Review the list of committee charges to ensure that each one is appropriately addressed.

Check at the end of the meeting to see if members feel that particular subjects have been properly covered.

All recommendations which are being submitted to the Executive Committee or Board of Directors must be in written form

and be presented to the NASFAA Office in sufficient time to be included in the meeting mailing. If an issue appears to warrant consideration by another NASFAA committee, the appropriate commission director should advise the National Chair and the President who will review the issue consulting with the commission director and staff, and make the assignment if appropriate.

Use the format for Action Requests provided in these appendices to transmit such requests to the Board of Directors or to another committee, e.g. Finance Committee.

Appendix 3
SAMPLE FORMAT FOR COMMITTEE REPORTS

Association Governance & Membership Committee
Fall 2009 Report to the Board of Directors

2009-10 Development Objectives from the Annual Plan:

DO #4 To **expand membership development**, marketing and outreach-oriented communications, and follow-up (SLRP Goal 3)

Explain in detail how the committee attempted to meet this objective.

DO #7 To **strengthen the Association** programmatically, organizationally, and technologically (SLRP Goal 6) [N] –

(c) Investigate the delivery nationally of programs and services for regional and state associations, including the balance of interdependent benefits and ways to enhance volunteerism (SLRP Goal 4) [FY08-09 DO #7] [N]

(g) Lay the groundwork for the next Strategic Plan through research and preparation for the planning process [N]

(h) Lay the groundwork for a formal committee structure to serve for planning purposes [N]

Explain in detail how the committee attempted to meet this objective and each of the sub-part under the objective.

National Chair's Goals – The National Chair has identified four priority areas of focus for all 2009-10 committees: Professional Certification; NCI Phases III & IV; Expanding diversity in our leadership/professional development efforts; and financial stability for the Association.

Explain what the committee did to address the Chair's priorities.

Suggested Committee Activities:

1. Review the Association's governance documents and update as appropriate.
2. Identify prospects for leadership positions; mentor and support them in their path toward becoming leaders.
3. Work with the National Chair-Elect to solicit volunteers and enhance their experience with NASFAA
4. Monitor/evaluate the committees' annual planning objectives & activities.
5. Advise President/CEO on issues important to the membership and assist in putting NASFAA at the forefront of student aid.
6. Review the value of continuing interregional visits for members of the Board in light of economic conditions.
7. Explore a self-evaluation for the Board of Directors to guide them in recognizing and carrying out their responsibilities.

Explain how the committee addressed the suggested activities clearly delineating what the committee did in each instance.

APPENDIX 4

NATIONAL ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS

ACTION REQUEST

TO: _____

SUBMITTED BY:

PROPOSED ACTION:

DISCUSSION:

CURRENT RELATED POLICY:

RELATIONSHIP TO STRATEGIC LONG-RANGE PLAN:

BOARD OF DIRECTORS ACTION:

DATE:

**APPENDIX 5
 NATIONAL ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS
 PROJECT DEVELOPMENT FUNDING REQUEST**

To: Finance Committee Submitted By:

Date:

Purpose:

Cost Estimate:

<u>Item</u>	<u>Labor</u>	<u>Other Direct</u>	<u>Shared Overhead @ 34%</u>	<u>TOTAL</u>
Development				
Printing				
Mailing				
Data Entry				
Analysis				
Other				
Subtotal				
5% Tolerance on Subtotal				
TOTAL				

Finance Committee Action:

Date:

Board Of Directors Action:

Date:

NOTE: Please submit copies of Project Development Fund requests to the Executive Vice President and to the Treasurer at least two weeks in advance of the Finance Committee meeting.

**National Association of Student Financial Aid Administrators
Travel Expense Claim**

To: NASFAA, 1101 Connecticut Ave., NW Suite 1100, Washington, DC 20036
 From: _____
 Address: _____

Directions: Please send this form, with receipts for all expenses in excess of \$3 to NASFAA. You may wish to retain a copy of this form for your records

Deadline: In order to receive reimbursement for approved travel expenses, this form must be received by NASFAA within 3 weeks of the travel date. For travel claims incurred after June 15, but before June 30, the travel claim form must be filed within two weeks. Travel claims presented which do not meet these criteria will not be considered eligible for payment.

The following expenses were incurred in attending the following meeting:
 Meeting: _____
 Place: _____
 Dates: _____

Date	MEALS				LODGING	TRANSPORTATION (Include parking, car rental if applicable)		CABS or LIMO	OTHER MISCELLANEOUS EXPENSES		DAILY TOTAL
	Breakfast	Lunch	Dinner	Total Meals		Description	Amount		Description	Amount	
Total											

By my signature below, I certify that I have/will not be(en) reimbursed by any other agency for any amount exceeding the actual cash outlay for this meeting.

Claimant's Signature _____

Total of Claim

Less advance or expenses billed directly to NASFAA

Total Requested

*****FOR OFFICE USE ONLY*****			
Date Received: _____	Authorized for Payment: _____	Date: _____	
Date Check Sent: _____	Account# _____	Travel Expense: _____	
		Lodging: _____	
		Meals: _____	
		Miscellaneous: _____	