



# CERTIFIED FINANCIAL AID ADMINISTRATOR<sup>®</sup> (CFAA) **COMMISSION HANDBOOK**

**MAY 2021**

# Certified Financial Aid Administrator® Program Commission Handbook

## Table of Contents

May 19, 2021

Introduction .....	1
Overview of the Certification Program .....	1
Purpose, Mission Statement, Core Principles, and Diversity Statement .....	2
Purposes of the Commission .....	3
Governance and Structure .....	4
Commission Background .....	4
Commission Structure .....	4
Roles and Responsibilities of Commissioners .....	5
Legal Duties of Commissioners.....	6
Commission Position Descriptions .....	8
Officers .....	8
Commission Chair-Elect .....	9
Commission Chair .....	9
Immediate Past Commission Chair .....	10
Program Manager .....	10
Fiscal Officer.....	11
Commission Secretary .....	11
Regional Representatives .....	12
Commissioner(s)-At-Large .....	13
Public Representative .....	14
Commission Vacancies .....	15
Dividing Duties Between Commission and Staff.....	16
Primary Roles of the Commission.....	16
Primary Role of the Staff .....	16
Specific Responsibilities.....	17
Guidelines and Policies for Commission Members.....	19
Appropriate Behavior and Conduct.....	19
Confidentiality Policy .....	20
Conflict of Interest Policy .....	20
Media Relations Policy .....	21
Commission Meetings.....	22
Expenses .....	22
Travel Guidelines and Policies .....	22
Conclusion .....	24
Appendix A: Certification Program Calendar .....	25

## INTRODUCTION

As a leader in NASFAA’s Certified Financial Aid Administrator® Program, it is important for you to understand the elements that have contributed to the program we know today, and for you to know what is expected of you during your term as a member of the certification program Commission.

This *Commission Handbook* compiles information from several sources to provide you with a single document to assist you during your term. As with each endeavor, we would appreciate your comments on the *Commission Handbook*, so we can modify and refine its contents to better assist members of the Commission in the future. Please feel free to offer your suggestions and comments to Margot O’Meara ([omearam@nasfaa.org](mailto:omearam@nasfaa.org)), Commission Secretary.

## OVERVIEW OF THE CERTIFICATION PROGRAM

The Certified Financial Aid Administrator® Program was approved for development by the NASFAA Board in the Spring of 2018, and officially launched in June 2019. The Financial Aid Administrator Certified (FAAC®) designation is conferred to candidates who have met the required eligibility criteria, including education and experience, and have successfully passed a knowledge exam.

The certification program supports the mission of NASFAA, which states “the National Association of Student Financial Aid Administrators (NASFAA) provides professional development and services for financial aid administrators; advocates for public policies that increase student access and success; serves as a forum on student financial aid issues, and is committed to diversity throughout all activities.”

Since 2012, NASFAA has conferred NASFAA Professional Credentials to financial aid professionals who have demonstrated their knowledge of various financial aid topics. Credential candidates had to complete one of four pathways to gain access to the credential test. Pathways include passing a NASFAA U Online Course, attending a NASFAA Authorized Event training, reviewing a NASFAA Self-Study Guide, or demonstrating at least five years of professional experience. Credentials are topic specific, and while they do not need to be maintained, they can be renewed. Based on success of the credentialing program, NASFAA supported the concept of a broader and more encompassing certification program. The certification is meant to build upon the base that the NASFAA Credentials have created, and further elevate the financial aid profession.

The FAAC® designation recognizes financial aid professionals who have the experience and knowledge necessary to competently administer Title IV Aid. It also signifies that these professionals are committed to further developing their skills and knowledge based on recertification requirements.

NASFAA is committed to developing and maintaining a quality certification program and has adhered to accreditation standards defined by the National Commission for Certifying Agencies (NCCA) throughout the development process. In the summer of 2018, NASFAA contracted with a psychometric consultant to conduct required tasks that will make the Certified Financial Aid Administrator® Program legally defensible. These tasks included a Job Task Analysis (JTA), which was conducted in the fall of 2018, an item writing and review workshop, which was conducted in January 2019, and Beta testing and item analysis, which occurred in May 2019.

The Certified Financial Aid Administrator® Program launched in June 2019, and the support and input from the Commission will ensure the success of this program.

## PURPOSE OF THE CERTIFICATION PROGRAM

The purpose of the Certified Financial Aid Administrator® Program is to enhance the future of the financial aid community by inspiring quality job performance, encouraging continuous learning, and promoting professional development among financial aid administrators at colleges and universities across the country. The certification program helps the higher education community and its stakeholders recognize financial aid administrators for their knowledge and experience, their role as stewards of taxpayer dollars and institutional funds, their contributions to the success of their institutions and their students, and their commitment to the highest standards of ethical behavior.

## CERTIFICATION PROGRAM MISSION STATEMENT

The Certified Financial Aid Administrator® Program Commission establishes competencies for excellence in financial aid administration and certifies individuals who have demonstrated proficiency with the body of knowledge pertaining to administering federal (Title IV) financial aid and its interaction with state and private financial aid.

## NASFAA CORE PRINCIPLES

All FAACs must agree to adhere to NASFAA's Core Principles, whether or not the FAAC® is a member of NASFAA. NASFAA believes that the purpose of student financial aid is to ensure everyone has equal access to postsecondary education. NASFAA adheres to the following core principles, originally created by the NASFAA Reauthorization Taskforce and updated during the National Conversation Initiative (NCI) process to reflect our current goals for college access and success. NASFAA affirms that student financial aid should:

1. Promote fairness and equity for students across all sectors of postsecondary education, with a particular emphasis on low-income, underrepresented and underserved students;
2. Stress the primacy of need-based aid;
3. Support policies that address the needs of disadvantaged students;
4. Advocate accountability;
5. Encourage simplicity and predictability;
6. Empower student financial aid professionals and their schools with the flexibility to respond to the specific needs of their students;
7. Recommend policies that accommodate the diversity of academic delivery models;
8. Encourage the use of technology wherever possible;
9. Eliminate statutory requirements that use financial aid to enforce unrelated social policies; and
10. Validate proposed recommendations with research and data analysis wherever possible.

## CERTIFICATION PROGRAM DIVERSITY STATEMENT

The certification program Commission is committed to diversity and equality in all activities. The Commission, in both its principles and practices, is committed to providing the financial aid community with credentialing practices that are based on inclusion and diversity. This means that there shall be no barriers to participation in any activity of the Commission on the basis of race, ethnicity, gender identity or expression, religion, age, sexual orientation, nationality, disability, appearance, geographic location, professional level or institution type. The Commission will seek diversity and inclusiveness in its business practices, and it will not condone any form of unlawful discrimination. The Commission recognizes and values the diverse skills, perspectives and experiences of the financial aid community and believes inclusiveness enhances the Commission's ability to serve this community.

## PURPOSES OF THE COMMISSION

To meet the requirements of the “[Standards for the Accreditation of Certification Programs](#)” published by the National Commission for Certifying Agencies (NCCA), NASFAA has created a Certified Financial Aid Administrator® Program Commission, which serves as an independent certifying body of NASFAA. The Commission awards the FAAC® designation and is responsible for setting policy and standards related to the Certified Financial Aid Administrator® Program.

The [Commission Standing Rules and Policies](#) describe the scope of the Commission’s responsibilities, in keeping with **NCCA Standard 2**, which mandates that the governance structure must:

- Protect essential certification decisions from undue or improper influence;
- Demonstrate autonomy in decision-making for all essential certification policies and activities;
- Represent the certified population, and may include other appropriate stakeholder groups;
- Include at least one public member, with voting rights, who represents the public or non-employer consumer interest; and
- Ensure Commissioners do not have a conflict of interest in their overall capacity to serve that could otherwise compromise the integrity of the certification program.

[NCCA Standard 2B](#) states: “The certification organization must identify its status as a legal entity (or part of a legal entity) and demonstrate that the certification board [Commission] has autonomy in decision-making for all essential certification policies and activities.” In Commentary #2, the NCCA explains this concept further: “Essential certification decisions refer to the core aspects of a certification program, such as eligibility standards; standards for initial certification and maintaining certification; disciplinary determinations; the development, administration, and scoring of examinations; and the selection of subject-matter experts (SMEs).”

The Commission has authority over certification standards, program quality, and ensuring the certification program serves its intended purpose. Overall ownership—including decision-making power over the existence or continuation of the program—rests solely with NASFAA.

Additionally, Commentary #5 explains: “Undue influence may result from pressures that diminish or negate the certification program’s ability to act freely on behalf of the interests of the certification program. Undue influence may also be caused by a lack of balanced representation on the certification board [Commission]. Examples of undue influence can include pressure from a parent organization or outside entity to adjust certification standards, limit the number of certificants, or either reduce or elevate the established standard or requirements. Appointment of a significant number of certification board members by a parent organization or related entity may be considered to constitute undue influence. The certifying organization must explain how selection of the certification board, whether by appointment, election, or nomination, protects the certification board from undue influence.”

The Chair of the Commission provides summary reports on Commission activities to the NASFAA Board periodically, and upon request, to keep the Board informed and to ensure a balance of stakeholder input and perspective.

## GOVERNANCE AND STRUCTURE

### COMMISSION BACKGROUND

The governing body of the Certified Financial Aid Administrator® Program is the Commission, which is responsible for establishing broad policies and for the general conduct of the affairs of the certification program. Therefore, the role of the Commission is one of planning, organizing, and directing the certification program to achieve its purpose as it focuses its attention on opportunities of professional development for financial aid administrators.

Authority for the Commission is provided in NASFAA's Letter of Support. While the Commission has jurisdiction over Certified Financial Aid Administrator® Program policies and standards, the Commission reports to the NASFAA Board, and is responsible to the NASFAA membership for all of its actions.

Commissioners are prohibited from preparation or presentation of instructional materials designed to train on Title IV Aid regulations, external to the operation of the individual's institution. Commissioners are also prohibited from preparation or presentation of instructional materials designed to prepare potential candidates for either NASFAA Professional Credentials or the FAAC® certification.

### COMMISSION STRUCTURE

The Commission will be comprised of six to nine voting members, as well as one or more NASFAA staff members (non-voting):

- (a) Six (6) regional representatives: One NASFAA member from each of the six regional professional associations, each of whom:
  - 1. Has earned and maintained the FAAC® designation;
  - 2. Is currently employed as a practicing aid administrator by a Title IV Eligible Institution; and
  - 3. Helps represent the diversity of the financial aid profession.

These members will serve for a two-year term, renewable at the discretion of the Commission Officers.

- (b) One (1) Public Representative: One member shall be a non-certified consumer/public member selected according to criteria outlined in the standards of the National Commission for Certifying Agencies (NCCA). This individual will serve for a three-year term, renewable at the discretion of the Commission Officers. The public member shall be an individual who represents the interests of direct and indirect users of the certified populations' skills and services; who is serving in a volunteer capacity; and who is interested in ethical, professional behavior on the part of financial aid administrators. The public member shall not be/have:
  - 1. A current or previous financial aid administrator;
  - 2. A supervisor, manager, direct co-worker, or an employee or subordinate of financial aid administrators;
  - 3. An employee of an individual certified by the certification program or of an employer of individuals in financial aid administration;
  - 4. A person who currently receives or within the last five years has received income from financial aid administration; or
  - 5. Worked for or provided contract services to the Commission or NASFAA at any time during the five years preceding his or her appointment as a public member.
- (c) Up to Two (2) Commissioners-At-Large: The number of Commissioners-At-Large will be at the discretion of the Commission Chair, and generally vary between one and two. These members will serve for a one-year term, renewable at the discretion of the Commission Officers. Each Commissioner-At-Large:
  - 1. Has earned the FAAC® designation and remains in good standing;

2. Is currently employed as a practicing aid administrator by a Title IV Eligible Institution; and
  3. Helps represent the diversity of the financial aid profession.
- (d) NASFAA Staff: At the discretion of the NASFAA President or the President’s designee, one or more NASFAA staff members will serve as ex-officio, non-voting Officers.

**Officers:** The Commission will have six Officers, three elected and three appointed.

1. The elected Officers of the Association shall consist of a Commission Chair, Commission Chair-Elect, and Immediate Past Commission Chair, who must be representatives of the FAAC® community.
2. The appointed Officers of the Commission shall be the Fiscal Officer, Program Manager, and Secretary. The Fiscal Officer, Program Manager, and Secretary shall be employees of the Association and shall not be subject to a limited term of office.

Per Standing Rule 5, Section 2, the Commission Chair-Elect is elected by the Commission through majority vote at or prior to the last meeting of the fiscal year. A vote may be conducted by electronic means, upon approval of the Program Manager and the Commission Chair. In case of a tie vote, the Chair’s vote will be counted. Nominations for Chair-Elect shall be submitted to staff on the proscribed form. Commissioners may self-nominate, or nominations may be submitted by any Commissioner. The public member is ineligible to serve as an Officer on the Commission.

**Terms:** Terms of the members of the Commission shall be as follows:

1. Regional Representatives serve for a two-year term, renewable at the discretion of the Commission Officers.
2. The Public Representative will serve for a three-year term, renewable at the discretion of the Commission Officers.
3. Commissioners-At-Large will serve for a one-year term, renewable at the discretion of the Commission Officers.
4. The terms of Commissioners elected as Chair or Chair-Elect may be extended in order to fulfill their terms as an Officer.
5. Regional Representatives’ terms are offset, so some of the Commission members will be eligible for renewal or replacement every year.
6. All voting members of the Commission are limited to two consecutive terms.

## **ROLES AND RESPONSIBILITIES OF COMMISSIONERS**

The Certified Financial Aid Administrator® Program Commission serves as the independent certifying body of NASFAA. The Commission awards the FAAC® designation and is responsible for setting policy and standards related to the certification program.

**Responsibilities of the Commission and its members include:**

1. Set the strategic direction for the Program.
2. Act to assure fiduciary responsibility to the Commission.
3. Establish, monitor and revise, as needed, the [Commission Standing Rules and Policies](#), and procedures related to the Program. All SR&Ps shall be reviewed annually and published [made publicly available] on the Certified Financial Aid Administrator® Program website, except those polices the release of which could potentially jeopardize the security or integrity of the Certified Financial Aid Administrator® Knowledge Exam (hereinafter referred to as the “knowledge exam”) or the security or integrity of the Program.
4. Initiate periodic job analysis studies and utilize the results to keep the knowledge exam specifications current.
5. Develop, monitor and revise, as needed, the initial and renewal application criteria and forms.

6. Approve the passing score for each exam.
7. Set examination policies within accepted psychometric practices.
8. Establish testing dates and approve fees for the knowledge exam and the Program.
9. Audit and monitor all Program-related testing and vendor products on an as-needed basis for the purpose of quality improvement compliance.
10. Respond to concerns and recommendations by candidates and certificants about the Program.
11. Confer the FAAC® designation on qualified candidates and revoke the designation as appropriate.
12. Hear appeals brought before the Commission based on established policy.
13. Investigate, deliberate, and bring to resolution, according to the [Commission Standing Rules and Policies](#), all professional conduct complaints against Certificants.
14. Attend Commission meetings and serve on committees and task forces or in other official functions as requested by the Commission Chair.
15. Actively promote the Program.

## LEGAL DUTIES OF COMMISSIONERS

Commission members must meet certain standards of conduct and attention in carrying out their responsibilities to the Certified Financial Aid Administrator® Program. These standards are described as the duty of care, the duty of loyalty and the duty of obedience. These collective duties apply to the entire Commission and require the active participation of all its members.

### Duty of Care

The Duty of Care requires that Commission members and Officers are fully informed about the program's activities, participate in decisions and do so in good faith. Commission members and officers must act in a manner they reasonably believe to be in the best interest of the program and must use the care and judgment of an ordinarily prudent person when making decisions as a steward of the program. The Duty of Care is carried out through the following actions:

- Be aware of the certification program's mission, plans and policies, and be sure they indeed serve the needs of the community that the commission members represent.
- Fully participate in commission meetings, deliberations and decisions by attending commission meetings and arriving fully prepared.
- Read, evaluate and ensure accuracy of all reports, including minutes, financial and committee reports.
- Ensure the program has sufficient resources to fulfill the mission of the program.
- Use independent and best judgment when making decisions.

### Duty of Loyalty

The Duty of Loyalty is a standard for faithfulness and requires all Commission members and Officers to give undivided allegiance when making decisions affecting the program. This means that Commission members must act in the interest of the program and not in their own interest or the interest of another entity, particularly one in which they have a formal relationship. The Duty of Loyalty is carried out through the following actions:

- Adherence to the Conflict of Interest Statement in the [Commission Standing Rules and Policies \(Policy #2\)](#).
- A commission member must disclose to the rest of the commission any information about him/herself that could have an impact on his/her decision-making and oversight function.



- A commission member can never use information obtained as a commission member for personal gain but must act in the best interests of the program.
- All Commission members will be asked to complete a Conflict of Interest and Confidentiality Statement annually.
- Always be thinking about and focusing on, priorities of the program and not that of yourself or another organization.

### **Duty of Obedience**

The Duty of Obedience requires Commission members and Officers to comply with all applicable federal, state and local laws and to adhere to the NASFAA association's By-Laws. Commission members exercise their own reasonable judgment concerning how the program should best meet its mission, but they are not permitted to act or speak publicly in a way that is inconsistent with the mission and goals of the program. The Duty of Obedience is carried out through the following actions:

- Thorough knowledge of the program's regulatory and reporting requirements and documents governing the program and its operations (such as the [Commission Standing Rules and Policies](#)).
- Represent the program in a favorable light.
- Speaking "with one voice" after a decision has been made, even if the individual commission member is in disagreement with the decision.
- Adhere to the terms of the Confidentiality Policy (see page 20 of this Handbook; see also the [Commission Standing Rules and Policies, Policy #2](#)).

## COMMISSION POSITION DESCRIPTIONS

### OFFICERS

Standing Rule 3, Section 7 - The Chair, Chair-Elect and Immediate Past Chair shall serve as the elected Officers of the Commission. The Fiscal Officer, Program Manager, and Secretary serve as the appointed officers of the Commission. The Officers shall set meeting agendas, and shall address matters involving interpretation of program policies between Commission meetings.

#### Qualifications for Elected Officers

- Serves as a full-time employee at a NASFAA member institution.
- Be an active FAAC® in good standing.
- Demonstrated leadership preferably at the state and regional association levels.
- Comfortable facilitating meetings, taking a public role and speaking publicly.
- Demonstrated ability to network and communicate with peers and colleagues.
- Shows integrity, respect, and humility.
- Demonstrated ability to represent members' issues.
- Active NASFAA membership is required; regional and state association membership preferred.

#### Qualifications for Appointed Officers

Must be employed by NASFAA.

#### Terms for Elected Officers

Elected Officers shall serve for a one-year term, in each role, resulting in a three-year commitment.

#### Terms for Appointed Officers

Appointed Officers do not have a term limit.

#### Officer Time Requirements

Holding an officer position requires a time commitment of at least two annual commission meetings, conference calls, correspondence, planning, writing reports, etc. Additional committee involvement could increase this time commitment. Employer support in advance is **strongly encouraged**.

#### Duties/Responsibilities of Commission Officers

- Participates in certification program activities to identify and prioritize trends in the profession.
- Participates on certification program committees and task forces as assigned.
- Performs functions, as needed, to assist in facilitating the work of certification program.
- Networks and reflects the issues of the certification program.
- Serves as ambassador to the FAAC® community on certification issues; actively advocates for the program.
- Encourages and promotes diversity and inclusivity within the FAAC® community.

## Voting

The Commission Chair shall be an ex-officio member of all committees of the Commission and shall vote only in the case of a Commission or committee tie. The Program Manager, Fiscal Officer, and Secretary shall serve as an ex-officio, non-voting members of the Commission. The Chair-Elect and Immediate Past Chair may vote.

### COMMISSION CHAIR-ELECT - Standing Rule 5, Section 4

## Election

Each year, **Commission Chair-Elect** candidates are nominated, either through self-nomination or nomination by any Commission member. The Commission members will then vote to select one. The Commission Chair-Elect automatically assumes the office of Commission Chair in the subsequent year, and the Commission Past-Chair the following year. This position requires a significant, three-year commitment:

1. Year One (July 1 to June 30): Chair-Elect Year
2. Year Two (July 1 to June 30): Chair Year
3. Year Three (July 1 to June 30): Past Chair Year

## Role & Responsibility

The role of the Commission Chair-Elect should be structured to ensure a meaningful contribution to the efficiency of the certification program, as well as the need for that person to gain all the necessary knowledge and involvement to become an effective Commission Chair. In the absence or disability of the Commission Chair, the Chair-Elect shall have the powers and perform all the duties of the Commission Chair without prejudice to his/her term as Commission Chair.

In the event of a position vacancy, the Commission Chair-Elect shall be filled in the same manner as original selection.

## Duties/Functions

- Perform all duties of the Commission Chair in the absence or disability of the Commission Chair.
- Prepare for the term of office as Commission Chair.
- Serves as liaisons to other groups as requested by the Commission Chair or Program Manager.
- Performs other duties as may be assigned by the Commission Chair or Program Manager.

### COMMISSION CHAIR - Standing Rule 5, Section 3

## Role & Responsibility

The Commission Chair shall preside at all meetings of the Commission and perform such other duties as pertain to that office. The Chair shall be an ex-officio member of all committees of the Commission and shall vote only in the case of a Commission or committee tie.

## Duties/Functions

- The Chair is responsible to the FAAC® community by:
  - being faithful to the mission and vision
  - mapping out the future by setting goals
  - focus on the financial oversight and legal compliance
  - develop and maintain the art of facilitating meetings

- coordinating the various certification committees, task forces, working groups – making sure they have a clearly defined plan and specific goals.
  - build and strengthen the Commission and ensure engagement
  - communicate effectively with the FAAC® community
  - develop and maintain a very strong partnership with the Program Manager and staff
  - assess performance
- Decision making is vitally important to this role. The Chair will be called upon to make suggestions and offer solutions to various matters. The Chair must be mindful of the needs of the FAAC® community and not let personal matters consume the situation.
  - The Chair must be ready and available to represent the Commission at NASFAA Board meetings. This requires flexibility in scheduling. The Chair’s school must be supportive of the role and the many times of being away.
  - The Chair must have presentation skills and have the ability to develop scripts for specific occasions.
  - The Chair is responsible for the development of Commission members and future leaders.
  - The Chair must be a good listener. Commentary is often not the appropriate response. The Chair must be a unifier and should seek consensus even in difficult situations.
  - Performs other duties as may be required of this leadership role.

#### **IMMEDIATE PAST COMMISSION CHAIR** - Standing Rule 5, Section 5

##### **Role & Responsibility**

The Immediate Past Commission Chair shall assist the Commission Chair and participate in deliberations of the any Committees designated by the Commission. He/she has a vote on the Commission. While serving in this capacity, the Immediate Past Commission Chair shall represent the Commission on NASFAA’s Ethics Commission, along with the Program Manager. In the absence or disability of both the Commission Chair and the Commission Chair-Elect, he/she shall have all the powers and shall perform all the duties of the Commission Chair. If the Immediate Past Commission Chair cannot perform the duties of that office, such duties would be carried out by the most recent preceding Past Commission Chair.

##### **Duties/Functions**

- Perform all duties of the Commission Chair in the absence or disability of the Commission Chair and the Commission Chair-Elect.
- Participate in deliberations of NASFAA’s Ethics Committee.
- Serves as liaisons to other groups as requested by the Commission Chair or Program Manager.
- Performs other duties as may be assigned by the Commission Chair or Program Manager.

#### **PROGRAM MANAGER** - Standing Rule 5, Section 7

The Program Manager shall be responsible for the operation of the certification program. The Program Manager shall be appointed by the NASFAA President. He/she shall supervise such other employees of the certification program. He/she shall perform such other duties as are consistent with the purposes of the certification program, and submit an Annual Report to the Commission and the NASFAA Association. He/She is prohibited from conducting trainings that prepares potential candidates for the certification knowledge exam.

**General Responsibilities** – The Program Manager is responsible for carrying out the purposes of the Certified Financial Aid Administrator® Program and the directives of the Commission.

### **Specific Duties and Responsibilities**

- Serve as the manager of the Certified Financial Aid Administrator® Program.
- Carry out the purposes of the certification program and the policies established by the Commission.
- Supervise and mentor employees on NASFAA’s certification and credentialing team.
- Submit an Annual Report.

### **FISCAL OFFICER** - Standing Rule 5, Section 6

The Fiscal Officer serves as the financial officer of the Commission. The Fiscal Officer shall be appointed by NASFAA’s President. He/she manages the Commission’s review of and action related to the Commission’s financial responsibilities and works with the NASFAA President to ensure appropriate policies, procedures, record-keeping, and internal controls are utilized. He/she is responsible for managing vendor contracts for services relating to the certification program, including a testing platform, psychometric needs, and marketing solutions. He/she shall hire, supervise and dismiss such other employees of the certification program, with approval and oversight from the NASFAA President. The Fiscal Officer shall submit an Annual Report to the Commission and the NASFAA Association.

The Fiscal Officer shall not have access to certification knowledge exam content and will recuse himself/herself from any discussion related to exam item-level concerns and/or appeals. To prevent inadvertent exposure to exam items, this Officer shall not have access to any areas of the Testing Center that contain test items and shall not know the password utilized to password-protect any documents or other files containing test items. Based on this lack of access to exam content, which presents no opportunity for conflict of interest, the Fiscal Officer is *not* prohibited from conducting trainings that prepares potential candidates for the knowledge exam.

**General Responsibilities** – The Fiscal Officer is responsible advising the Commission on financial matters.

### **Specific Duties and Responsibilities**

- Propose a budget to the Commission for review that will achieve a breakeven (or otherwise acceptable) financial position, including the anticipated projected costs for any projects essential to conducting effective and thorough certification and renewal activities (such as a job analysis study, psychometric review of test effectiveness, standard setting, etc.);
- Negotiate and enter into contracts on behalf of NASFAA.
- Hire, supervise and dismiss such other employees of the certification program, with approval and oversight from the NASFAA President.
- Submit semi-annual fiscal summaries to the Commission and Financial Affairs Committee (FAC).

### **COMMISSION SECRETARY** - Standing Rule 5, Section 8

The Secretary shall be appointed by and serve at the will of the Program Manager. The Secretary shall be responsible for preparing minutes of all meetings of the Commission and for maintaining all relevant Commission records. This Officer is prohibited from conducting trainings that prepares potential candidates for the knowledge exam.

## REGIONAL REPRESENTATIVES

### Appointment

Based on nominations brought forth when appointments are needed, Commission voting members will be confirmed by a unanimous decision of Commission Officers during the last meeting of the fiscal year. Commission members will be limited to two consecutive terms on the Commission.

### Role & Responsibility

The primary role of this position is to serve as representatives and advocates of the certification program to the NASFAA membership and broader FAAC® community, and as a conduit for providing feedback from members and broader community to the Certified Financial Aid Administrator® Program. While regional representatives bring a unique regional perspective, it is important they recognize and embrace the fact that, legally and ethically speaking, when they sit on the Commission and make certification decisions, they must put the needs of the Certified Financial Aid Administrator® Program first and foremost, even above regional considerations.

Regional Representatives serve a two-year term, with the option to renew for an additional two-year term at the discretion of the Chair. The position requires a time commitment of at least two annual commission meetings. Time is also required for conference calls, correspondence, planning, writing reports, etc. Additional committee appointments could increase this time commitment and the ability to actively participate on them is required. Employer support in advance is **strongly encouraged**.

### Functions

- Participates in certification program activities to identify and prioritize trends in the profession.
- Participates on certification program committees and task forces as assigned.
- Performs functions, as needed, to assist in facilitating the work of certification program.
- Networks and reflects the issues of the certification program.
- Serves as ambassador to the FAAC® community on certification issues; actively advocates for the program.
- Encourages and promotes diversity and inclusivity within the FAAC® community.
- Serves as liaisons to other groups as requested by the Chair or Program Manager.
- Encourages and promotes diversity and inclusivity within the FAAC® community.
- Performs other duties as may be assigned by the Commission Chair or Program Manager.

### Qualifications

- Serves as a full-time employee at a NASFAA member institution.
- Be an active FAAC® in good standing.
- Demonstrated leadership preferably at the state and regional association levels.
- Demonstrated ability to network and communicate with peers and colleagues.
- Demonstrated ability to represent members' issues.
- Active NASFAA membership is required; regional and state association membership preferred.

## COMMISSIONER(S)-AT-LARGE

### Appointment

Based on nominations brought forth when appointments are needed, commission voting members will be confirmed by a unanimous decision of Commission Officers during the last meeting of the fiscal year. Commissioners-At-Large will serve for a one-year term, renewable at the discretion of the Commission Officers. Commission members will be limited to two consecutive terms on the Commission.

### Role & Responsibility

The primary role of this position is to represent the FAAC® community on the Commission without regard to geographical location or regional affiliation. They serve as representatives and advocates of the FAAC® community at-large, and as a conduit for providing feedback from the community to the commission.

Commissioners-at-large serve a one-year term, with the option to renew for an additional two-year term at the discretion of the Chair. This position requires a time commitment of at least two annual commission meetings. Time is also required for conference calls, correspondence, planning, writing reports, etc. Additional committee appointments could increase this time commitment and the ability to actively participate on them is required. Employer support in advance is **strongly encouraged**.

### Functions

- Participates in certification program activities to identify and prioritize trends in the profession.
- Participates on certification program committees and task forces as assigned.
- Performs functions, as needed, to assist in facilitating the work of certification program.
- Networks and reflects the issues of the certification program.
- Serves as ambassador to the FAAC® community on certification issues; actively advocates for the program.
- Encourages and promotes diversity and inclusivity within the FAAC® community.
- Serves as liaisons to other groups as requested by the Chair or Program Manager.
- Encourages and promotes diversity and inclusivity within the FAAC® community.
- Performs other duties as may be assigned by the Commission Chair or Program Manager.

### Qualifications

- Serves as a full-time employee at a NASFAA member institution.
- Be an active FAAC® in good standing.
- Demonstrated leadership preferably at the state and regional association levels.
- Demonstrated ability to network and communicate with peers and colleagues.
- Demonstrated ability to represent members' issues.
- Active NASFAA membership is required; regional and state association membership preferred.

## PUBLIC REPRESENTATIVE

### Appointment

Based on nominations brought forth when appointments are needed, commission voting members will be confirmed by a unanimous decision of Commission Officers during the last meeting of the fiscal year. The candidates will be elected to serve three-year terms. Commission members will be limited to two consecutive terms on the Commission. The Public Representative cannot serve as Commission Chair.

### Role & Responsibility

The public member shall be an individual who represents the interests of direct and indirect users of FAAC® skills and services; who is serving in a volunteer capacity; and who is interested in ethical, professional behavior on the part of financial aid administrators. The primary role of this position is to represent the public stakeholders of the certification program. They serve as representatives and advocates of the Certified Financial Aid Administrator® Program to the public, and as a conduit for providing feedback from the public to the commission.

Public Representative serves a three-year term, with the option to renew for an additional three-year term at the discretion of the Chair. The Public Representative position requires a time commitment of at least two annual commission meetings. Time is also required for conference calls, correspondence, planning, writing reports, etc. Additional committee appointments could increase this time commitment and the ability to actively participate on them is required. Employer support in advance is **strongly encouraged**.

### Qualifications

- The public member shall not be/have:
  - A current or previous financial aid administrator;
  - A supervisor, manager, direct co-worker, or an employee or subordinate of financial aid administrators;
  - An employee of an individual certified by the certification program or of an employer of individuals in financial aid administration;
  - A person who currently receives or within the last five years has received income from financial aid administration; or
  - Worked for or provided contract services to the Commission or NASFAA at any time during the five years preceding his or her appointment as a public member.
- Demonstrated ability to network and communicate with one's peers and colleagues.
- Demonstrated ability to represent the public's interest and issues.

### Functions

- Represent the public interest.
- Provide insight on ways in which the FAAC® designation impacts the public.
- Participates on certification program committees and task forces as assigned.
- Performs functions, as needed, to assist in facilitating the work of certification program.
- Networks and reflects the issues of the certification program.
- Serves as liaisons to other groups as requested by the Commission Chair or Program Manager.
- Performs other duties as may be assigned by the Commission Chair or Program Manager.



## COMMISSION VACANCIES

A vacancy in the office of the Commission Chair is filled by the Commission Chair-Elect. A vacancy in the office of the Commission Chair-Elect is filled by the method of original selection. A vacancy in the office of the Immediate Past Commission Chair is filled by the next most Immediate Past Commission Chair.

In the event that a current Regional Representatives, Commissioners-At-Large or Public member cannot complete his or her term, the Commission Chair may appoint a new Commission member to fulfill the term.

## DIVIDING DUTIES BETWEEN COMMISSION AND STAFF

The Commission and NASFAA's certification program staff will be working closely to ensure the success of the Certified Financial Aid Administrator® Program. The Commission is the independent certifying body of NASFAA and is responsible for setting policy and standards related to the certification program. NASFAA's certification program staff are responsible for the day-to-day operations of the program and ensure the policies and standards are being met.

### PRIMARY ROLES OF THE COMMISSION

When defining the role of the Commission, it is important to remember that the role refers to the group, not to the individual Commission members. The Commission functions as a team. The governing body together has two main priorities:

- Direction – The Commission guards the mission of the program and, through guidelines, steers it in the right direction.
- Oversight – The Commission monitors the activities, the health, and the ethical behavior in the certification program, ensuring the program is adhering to policies and standards.

### PRIMARY ROLE OF STAFF

The Program Manager is responsible for the daily operation of the certification program. Maintaining regular contact with the Commission and particularly the Chair, the Program Manager keeps the Commission informed about the issues that are part of the life in the program. The rest of the staff works under the direction of the Program Manager to implement the directives set by the Commission. The Program Manager, along with the Fiscal Officer and Secretary, provide insight and may advise the Commission on various decisions, through his/her role as an appointed Officer on the Commission.

In general, the role of the NASFAA staff is to manage the affairs of the certification program, to carry out the policies of the program, as approved by the elected officers and representatives, and to encourage and facilitate the work of any task forces or committees.

Some of the specific roles of the NASFAA staff are the following:

- Responsibility for the daily workflow and operations of program activities.
- Overseeing the fiscal management of the certification program, including the fiscal affairs of task forces or committees
- Writing and producing or coordinating certification program publications.
- Providing staff support to task forces and Committees.
- Providing fiscal management for all contracts.
- Coordinating and planning all certification program meetings.
- Maintaining FAAC® candidate and certificant records.
- Responding to inquiries from the FAAC® community.

## SPECIFIC RESPONSIBILITIES

### Oversight

Commission: Health and success of the Certified Financial Aid Administrator® Program

- Approves Commission policies to guide and protect the program
- Monitors that all legal requirements/duties get proper attention
- Delegates the daily operations to the Program Manager
- Expects regular and objective reports from staff

Program Manager: Programs and administration

- Oversees daily operations
- In conjunction with the Fiscal Officer, selects vendors for program needs (testing, psychometrics, certification management, etc.)
- Delegates operational responsibilities to staff
- Ensures appropriate record keeping policies are established and followed

### Planning and Evaluation

Commission: Strategic framework for the Certified Financial Aid Administrator® Program

- Adopts an overall strategic mindset by focusing on the big issues that matter most
- Actively participates in strategic sessions
- Evaluates its own performance regularly
- Via staff reports, assesses the program's achievement of its goals

Program Manager: Strategic and operational planning

- Ensures that strategic planning happens with the Commission's appropriate involvement
- Leads operational planning and approves the plans for the staff
- Ensures a process for staff and volunteer performance exists, and evaluates his or her own performance

### Finances

Commission: Fiduciary duty to the Certified Financial Aid Administrator® Program

- Reviews the annual program budget and monitors the financial reports

Fiscal Officer: Financial management

- Prepares the budget for certification program operations, and presents to the Commission
- With the help of the financial staff, prepares the annual budget and provides the Commission and NASFAA Board of Directors with semi-annual financial summaries
- With staff, handles the daily financial operations and monitors cash flow
- Defines financial policies and procedures for all daily money transactions
- Ensures that the Certified Financial Aid Administrator® Program is adhering to NASFAA's overall fiscal policies

## Commission Recruitment and Development

### Commission:

- Ensure that the Commission's composition reflects the program's needs: actively cultivates new recruits
- Drafts Commission-specific policies
- Incorporates governance training, including orientation, into regular Commission schedule

### Program Manager:

- Assigns staff to support the Commission in meeting and orientation preparation
- Identifies potential new Commission members
- Manage the volunteer recruitment and application process

## GUIDELINES AND POLICIES FOR COMMISSION MEMBERS

To assist Commissioners in carrying out their responsibilities, the following guidelines are suggested.

1. Get to know other members of the Commission, particularly those from other regions.
2. Arrange travel schedules to be in attendance for the entire meeting. Action may be taken at any time during the meeting, and the agenda will often be altered to accommodate the needs of guests and make best use of the time.
3. Utilize the most economical means of transportation. Commission members who are reimbursed by NASFAA must file travel vouchers promptly and in accordance with NASFAA travel regulations.
4. For in-person meetings, NASFAA staff is responsible for arranging hotel accommodations for Commission meetings.
5. Actively participate in the discussions and deliberations of the Commission. Make substantive comments while avoiding points already covered.
6. All meetings will be run using parliamentary procedure (Roberta's Rules of Order).
7. Complete assignments in accordance with the required schedule.
8. Read and study meeting materials in advance of the meeting. Seek input of other aid administrators regarding critical issues on the agenda.
9. During discussion, listen to divergent points of view. Make decisions based on the purposes of the certification program and what is best for the certified population and/or the entire financial aid administrator community.
10. Avoid trying to redo committee work. Remember that the committee has probably spent many long hours developing their recommendations and reviewing an issue. Act on the general content or concept and avoid trying to rewrite or second guess a position. If the recommendation is unacceptable, either vote it down or refer it back to the committee with clear direction as to the concerns of the Committee members.
11. Think public policy. Consider the broad objectives of what is being considered.
12. Make your role visible. Attend your regional and state association meetings, to the extent possible. Let others know you represent them on the Commission and welcome their feedback. Partner with NASFAA staff when addressing any concerns.
13. Direct positive criticism where it can do the most good. Discuss any concerns with the appropriate party. This may be a staff member or the Commission Officers. No one likes to hear criticism second-hand.
14. Sensitive to the concerns of our members, NASFAA affirms the right of all individuals to function in an environment free of offensive behavior.

### APPROPRIATE BEHAVIOR AND CONDUCT

NASFAA is committed to providing a safe, productive and harassment-free environment at its conferences, trainings, commission and committee meetings, and other NASFAA-sponsored events. NASFAA prohibits harassment or discrimination based on race, religion, gender, sexual orientation, gender identity, gender expression, disability, ethnicity, national origin, or other protected status. It also prohibits sexual harassment or intimidation, including unwelcome sexual attention, stalking (physical or virtual), or unsolicited physical contact; and threatening behavior.

These conduct rules apply to all attendees and participants at any NASFAA-sponsored event, including online events. Any violations should be reported immediately to a member of the NASFAA staff; we also expect participants to alert venue staff or security of any dangerous situations, or of anyone in distress.

NASFAA reserves the right to remove any individual from attendance or other participation in any NASFAA-sponsored event without prior warning or refund, and to take additional action as determined necessary, up to and including expulsion from participation in NASFAA.

## CONFIDENTIALITY POLICY

During the course of service at NASFAA, Commission members may learn of information about NASFAA, NASFAA members, the Certified Financial Aid Administrator® Program, FAAC® community members, and NASFAA employees that is considered confidential. We believe it is vital to the security and integrity of the Association and certification program that Commission members use this information only for its intended purposes and protect it from disclosure. This includes discussing any information considered confidential to external parties, employees or former employees, past Commission members, Program Managers, or Commission Chairs without a “need to know.”

If there is a question of whether certain information is considered confidential, Commission members should inquire with the Program Manager. It is the policy of the Association to ensure that confidential information is adequately safeguarded.

The confidentiality policy will be signed yearly by the full Commission and by specified committee members (as deemed necessary by the Commission Chair). It is intended to alert committee members of the need for discretion at all times and is not intended to inhibit normal business communications. All inquiries from the media need to be referred to the Program Manager.

## CONFLICT OF INTEREST POLICY

In their capacity as the governing body to the Certified Financial Aid Administrator® Program, Commission members must at all times avoid conflicts of interest with respect to their certification program fiduciary responsibility. According to the DC Nonprofit Corporation Act (effective Jan. 2012), directors “must disclose to other board or committee members information not already known by them but known by the director to be material to the discharge of his or her decision-making or oversight functions.” Therefore:

1. Commission members will annually disclose their involvement with other organizations, vendors, or any other associations that currently do business or may do business with NASFAA or its members. Examples of disclosable relationships would include:
  - Membership on another higher education or financial-aid related advisory/governing boards, committees, work groups or task forces
  - Membership on a NASFAA Associate’s advisory/governing boards, work groups or task forces.
2. Information exclusive to NASFAA shall not be used by Commission members for personal gain or the gain of a family member or associate, or any other party or organization.
3. Commission members shall immediately disclose to the Commission any and all impending conflict of interest. Members shall recuse themselves, or the Commission shall ask them to recuse themselves, without comment from both the deliberation and final decision-making in cases where conflict is present.
4. Commission members must not use their positions to obtain employment or special considerations at NASFAA.
5. There will be no self-dealing or any conduct of private business or personal services between any Commission member and NASFAA.

## MEDIA RELATIONS POLICY

### Background

Effective media relations can increase positive exposure for the association and mitigate negative perceptions. It can also assist NASFAA in its core advocacy and outreach efforts to assist schools and increase access to higher education for students. Conversely, poor handling of media inquiries can decrease our effectiveness as an advocate for schools and students. NASFAA strives to advance its mission by communicating openly and honestly using consistent messages with its constituents, including the media. For these reasons, we ask that Commission members adhere to the following media policy to ensure that information about NASFAA provided to the news media is presented carefully, consistently and accurately.

### Policy/Procedure

1. A media inquiry is any contact by a reporter, writer, editor, producer, or any other representative of electronic (radio, TV, wire, web) or print media. While most reporters identify themselves as such, some may not. As a general rule, be sure you know who your callers are and what media outlets they represent before engaging in any discussion.
2. Next, determine whether the reporter is asking you to speak on behalf of your institution, or on behalf of NASFAA, as a Commission or committee member. If the former, proceed through your normal internal channels for media inquiries on your campus. If the latter, we ask that you please refer ALL media inquiries to NASFAA's Communications Department ([news@nasfaa.org](mailto:news@nasfaa.org) or 202-785-6944), and cc the Program Manager.

Suggestion for dealing with initial media inquiry:

*"Thank you for your inquiry. As a matter of policy, all media inquiries are referred to NASFAA's Communications Department so that they can identify the person who can best answer your questions. May I have your name, number, media outlet and deadline so that I may have someone from NASFAA return your call? If you prefer, you may call Beth Maglione at 202-785-6944 or send an email to [news@nasfaa.org](mailto:news@nasfaa.org)."*

3. Next, NASFAA's Communications staff will work to determine an appropriate response strategy, to ensure that all answers are accurate, consistent and on-message. Communications, in consultation with the NASFAA president, will designate an appropriate spokesperson either on staff or on the Commission (it may be that the Commission member who received the media inquiry is the right person). Communications will then follow-up with the reporter and the designated spokesperson(s), to set up the interview. We will also work with the spokesperson to discuss/recommend key talking points.
4. Lastly, all articles which mention NASFAA are included in Today's News. However, we are not always able to find every smaller/regional newspaper that mentions NASFAA through our regular daily web searches. If you are aware of an article that mentions NASFAA and should be published in Today's News, but has not yet appeared, please email it to [news@nasfaa.org](mailto:news@nasfaa.org).

## COMMISSION MEETINGS

Meetings of the Commission are held at the call of the Commission Chair or by petition of four (4) or more members of the Commission. At least two meetings of the Commission must be held each year.

The Commission Chair typically prepares the agenda in concert with the Program Manager at Commission meetings.

### Annual Commission Meeting Calendar

There are at least two Commission meetings per year, scheduled as far in advance as reasonably practical. The Commission may hold conference calls, typically via webmeeting, and may convene face-to-face Commission meetings as warranted.

## EXPENSES

Costs for attendance at Commission meetings are paid by NASFAA for chairs, all members of the Commission, staff, and invited Committee Chairpersons. Reimbursement for expenses will be made in accordance with [NASFAA's travel reimbursement policy](#).

NASFAA uses Bill.com to process and pay bills and reimbursements. We ask that the Commission sign up via Bill.com to be reimbursed by NASFAA electronically, via direct deposit. Direct deposit is less expensive for NASFAA and helps you receive your reimbursements much faster than waiting for a paper check. New Commission members will receive an email from Bill.com with instructions for set-up. Once you have signed up, travel expense reports (along with receipts) must be scanned into one single PDF and emailed to [nasfaapayables@bill.com](mailto:nasfaapayables@bill.com).

There are some specific rules pertaining to any Commission meeting held in conjunction with NASFAA's annual conference:

- NASFAA reimburses for additional hotel costs incurred by Commission members (maximum of two nights). This generally does not include the night before the regular conference program begins.
- NASFAA reimburses for any outside meal expenses they incur during those two days (usually dinner, as most breakfasts and lunches are catered)
- NASFAA DOES NOT pay for air travel or other transportation or incidental expenses to/from the conference.

## TRAVEL GUIDELINES AND POLICIES

General – Travel claims should be filed within 3 weeks of the meeting and mailed to: NASFAA, Attn: Finance Dept., 1801 Pennsylvania Ave, NW, Suite 850, Washington, DC 20006-3606. They may also be emailed to the Program Manager ([shogrens@nasfaa.org](mailto:shogrens@nasfaa.org)), with a copy to NASFAA's Finance Dept. ([nasfaapayables@bill.com](mailto:nasfaapayables@bill.com)). Per IRS requirements, each travel expense form submitted must be accompanied by receipts for all reimbursable expenses (including airline tickets, hotel bills, taxi receipts, itemized meal receipts, etc.). If emailing, please remember that we still require a scanned or faxed copy of all your original receipts. FAX: (202) 318-4309.

Transportation - Airline – Volunteers make their own flight reservations, and are asked to do so as soon as notified by the Program Manager once meeting dates are confirmed, to obtain lower airfares. If a meeting is canceled or an emergency occurs, NASFAA will cover any cancellation, change or other fees incurred as a result; if you are allowed by the airline to retain a credit, you can expense the difference to NASFAA. All air travel should be lowest cost, coach-class. Special accommodations (extra leg room, flight changes for convenience) need to be approved in advance by the Program Manager.



Airline Baggage Fees – NASFAA will reimburse baggage fees for one (1) checked bag.

Automobile – Reimbursement for the use of a private car will not exceed the per-mile amount currently allowed by the IRS, currently **57.5** cents per mile. Normally, this reimbursement should not exceed the cost of lowest price, 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 in advance by the Program Manager.

Taxi or Ferry – Ground transportation expenses to and from meeting/lodging facilities should not include costs for personal choices (e.g., NASFAA would not reimburse cab fare to lunch at a restaurant when a meal is already provided for the Commission). All transportation costs, including parking charges, must be supported by receipts.

Other Travel – On rare occasions, NASFAA will schedule a Commission meeting to take place at one of the annual regional meetings. If this happens to take place in a Commission members' home region, NASFAA will reimburse *meal expenses only*, unless the volunteer *would not normally* attend his/her regional meeting. Questions or requests for exceptions should be directed to the Program Manager.

Hotel Accommodations – NASFAA staff will make hotel arrangements for volunteers. Reservations will generally be made for the nights preceding each day of the meeting. Unless a shared room is preferred, all rooms will be single rooms.

If additional nights are required, or if individual plans change, volunteers are required to contact the Program Manager as soon as possible to avoid paying for unused rooms. Commission 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 reservation and stay at another location, he or she may do so; however, reimbursement will be limited to the rate NASFAA has negotiated at the primary hotel.

Meals – NASFAA's adheres to the Domestic Per Diem Rates (<https://www.gsa.gov/travel/plan-book/per-diem-rates>) as specified by the U.S. General Services Administration (GSA). If meals are provided at a NASFAA meeting, other eating arrangements will be a personal expense. For most meetings, lunch is typically provided, with dinner on your own and reimbursable per GSA standards (note that GSA prorates the per diem by meal). Breakfast is usually complimentary at your hotel. Volunteers who pay for a group meal will be reimbursed at the appropriate per diem rate for the number of attendees. For restaurant meals, please submit both the itemized receipt (reflecting number of guests and itemized food/drink) and credit card payment slips, per IRS rules.

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

Tips – We allow reasonable (\$1-2) tips to porters, baggage carriers, bellhops, etc. Tips for hotel maids may not exceed \$3/day.

Telephone/Internet – Only phone calls for NASFAA business and one brief call home daily may be claimed. To avoid surcharges, please do not make calls from hotel rooms unless using a calling card. Free wireless internet is available in NASFAA's office, where most meetings are held; therefore NASFAA will not reimburse internet access fees.

Miscellaneous Expenses – Any miscellaneous expenses above \$3 must be supported by receipts and itemized on the expense form.

## CONCLUSION

While this *Commission Handbook* contains a comprehensive overview of the duties and responsibilities of the leadership of the Certified Financial Aid Administrator® Program, a more complete rendering of the Commission-accepted policies appears in [\*Certified Financial Aid Administrator® Program Commission Standing Rules and Policies\*](#).

## APPENDIX A – CERTIFICATION PROGRAM CALENDAR

NASFAA’s year of service for all Commissioners *begins* July 1 and *ends* June 30. Timeframes below are preferred, not required.

### June

- NASFAA National Conference
- Last testing window of fiscal year
- New Commissioner On-Boarding

### July

- First Commission meeting of the new fiscal year
- First testing window of the fiscal year

### September

- Second testing window

### October

- Third testing window (late Oct/early Nov)
- Annual Certification Survey

### November

- ICE Exchange Conference
- Second Commission meeting (if needed)

### December

- Fourth testing window

### January

- NASFAA staff and Fiscal Officer begins budget construction for following year
- Call for Commission nominations opens

### February

- Fifth testing window
- Leadership & Legislative Conference held in DC

### March

- Last Commission meeting of the fiscal year (unless more meetings are needed)
- Elect Chair-Elect, effective July 1
- Replace any positions for which a service term ends as of June 30, effective July 1
- Chair appoints Commissioner-At-Large, effective July 1

### April/May

- Sixth testing window
- Item Writing Workshop
- Commission Chair update at NASFAA’s annual Business Meeting

### Ongoing, As Needed:

- Recruitment of volunteers
- Commission Meetings

**The National Association of Student  
Financial Aid Administrators (NASFAA)  
provides professional development for  
financial aid administrators;  
advocates for public policies that  
increase student access and success;  
serves as a forum on student financial  
aid issues; and is committed to  
diversity throughout all activities.**

© 2021 National Association of Student Financial Aid Administrators



NATIONAL ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS

1801 PENNSYLVANIA AVENUE NW, SUITE 850  
WASHINGTON, DC 20006

202.785.0453 FAX. 202.785.1487 WWW.NASFAA.ORG