



# NYSFAAA Region III Policies and Procedures

with thanks to Region II colleagues' Policies and Procedures, on which these are based.

## Article I – Purpose of Regional Meetings

Regional meetings are conducted to identify and discuss topics of interest and update the region's membership on recent developments and activities within the financial aid community. The regional Executive Council Representative and Chairperson serve as moderators and facilitators of these meetings. Regional meetings serve as a valuable conduit for information and concerns between the regional members and the NYSFAAA Executive Council.

## Article II – Regional Affiliations

Regional affiliation is determined by the county in which the member's institution resides, see map at NYSFAAA website, <https://nysfaaa.memberclicks.net/regions>. However, a member may choose to belong to any region or may hold memberships in additional regions (additional membership fee *may* be requested by other than 'home' region).

## Article III – Officers, duties of officers

Active NYSFAAA membership required for all Officers.

### **Regional Councilperson (Executive Council Representative)**

The Regional Councilperson shall represent regional membership at all meetings of the Executive Council, co-officiate meetings of the Regional Association and shall perform such duties in furtherance of the goals and objectives of both the region and the state association. Quarterly Regional and Annual reports to submissions to Exec Council Secretary (State association level).

**Term:** Two Years

### **Regional Chairperson**

The Regional Chairperson shall chair all meetings of the Region and shall be responsible for the coordination of the agenda, site, time and date of each meeting, and other duties as assigned by the Regional Councilperson.

**Term:** One Year

### **Regional Secretary**

The Regional Secretary shall record and maintain all documents pertinent to each regional meeting and other such duties as assigned by the Regional Councilperson and/or Chair.

**Term:** One Year

### **Regional Treasurer**

The Regional Treasurer shall be responsible for receiving and disbursing all monies of Region III. Adequate and appropriate records shall be kept including all receipts, bills and disbursements. The Treasurer shall be ready, whenever required, to turn over all records to Region III, as well as to the successor when elected. The Treasurer shall submit quarterly and annual reports to the State Treasurer, as scheduled by State Treasurer, with copies to Regional Councilperson and Chair.

**Term:** One Year

## Article IV – Regional Elections and Nominations Committee Head

**Purpose:** To prepare a slate of candidates for regional officers, committees, and councilperson.

### **Duties**

1. Determine the positions to be filled each year.
2. Solicit nominations for those positions from the membership.
3. Establish a slate of candidates for whom the members will vote.
4. Coordinate ballot creation, distribution and vote counting with state TICC.
5. Announce results at a regional meeting.

### **Membership**

1. Chairperson
2. At least two other members, if necessary, to assist Elections and Nominations committee head executing duties.

**Tenure:** One year, renewable.

### **Qualifications**

1. NYSFAAA membership.

### **Time Line**

1. March 15 – Determine the positions to be filled each year.
2. March 20 – Solicit nominations for positions from the membership.
3. April 20 – Establish a slate of candidates.
4. April 20 – Confirm each nominee's willingness to serve.
5. April 25 – e-mail ballots to the membership.
6. May 15 – Obtain count returns from TICC.
7. May 20 – Announce results to all nominees.
8. May 22 Announce results to entire membership.

## Article V – Regional FAFSA Completion & High School Counselor Committee Head

**Purpose:** Provide high school counselors in Region III an annual update on financial aid programs, changes and application process. Assist students and families completing annual FAFSA and TAP applications. Collaboration with HESC for virtual FAFSA completion event/s.

### **Duties**

1. Develop and define a training curriculum to meet the needs of new and experienced high school counselors.
2. Work with HESC to provide mailings, information and registration materials, as needed.

3. Coordinate with the NYSFAAA statewide committee on dates and of workshops.
4. Participate in statewide committee meeting/s.
5. Prepare a budget for effort/s (may solicit support from the vendor community).

**Membership**

1. Region III Committee Head
2. Volunteers from Region III
3. At least one high school counselor

**Tenure:** One year, renewable

**Time Line**

1. By May – Determine who in region is interested in working on committee; ask high school counselors for representation.
2. June – Committee Head or representative attends statewide committee meeting.
3. July\* – Determine dates and sites.
4. By September\* – Committee meets to determine program and volunteer responsibilities.
5. Late October/Early November\* – Mail invitations to high school counselors.
6. Late November/Early December\* - Workshop

\*Subject to change based on Department of Education and/or NYS HESC deliverables

Article VI – Regional Membership and Mentor Committee Head

**PURPOSE:** To maximize the membership and encourage active involvement of new members of the Association in professional development and toward leadership positions within the association. NYSFAAA First Vice President chairs statewide committee

**DUTIES:**

1. Represent Region III at state-wide Membership and Mentor meetings/events.
2. Within region, conduct activities determined at statewide meetings. **MEMBERSHIP:**
  - a. Work with the Novice Training Committee and the Membership Chair to identify and contact new members.
  - b. Work with other Statewide Committee chairs to identify opportunities for mentees to serve on committees and assist in connecting mentees to those opportunities.
  - c. To coordinate mentoring activities related to the annual Conference, including the awarding of Mentoring Scholarship(s).

**TENURE:** one year renewable.

Article VII – Regional Diversity, Equity and Inclusion Committee Head

**PURPOSE:** Assist statewide ensuring the Association is adhering to their DEI commitment to being a safe space organization for all its members and associates, and provide ongoing education on the topic. The Committee will actively work to ensure that NYSFAAA provides a platform that is Diverse, Equitable and Inclusive, so all members feel accepted, empowered and safe.

One active member from each region, nominated by the region, confirmed by NYSFAAA President and Statewide DEI Committee Chair.

**TENURE:** one year renewable.

**DUTIES,** in collaboration with statewide committee members:

1. Review NYSFAAA DEI statement annually for relevancy.
2. Provide annual action plan, including internal activities and training.
3. Provide presentation on DEI-related topics at the annual conference and any NYSFAAA events.
4. Responsible to maintain the mission of DEI in all NYSFAAA activities.

## Article VIII – Regional Awards Committee Head

**Purpose:** To select from membership, worthy recipients of Achievement, Service, and other awards as established by the Association. Prepare for the presentation of these awards at the annual conference. To coordinate the collection of regional service award recipients and to assist regions in securing the plaques for said awards.

### **Duties**

1. To solicit nominations for the Region III Service Award. Nominations accepted year-round and may carry forward.
2. To set up a meeting in late spring, early summer to select from the award recipients. This meeting can be in-person, telephone conference call or virtual.

### **Membership**

1. One person to serve on the state committee and to coordinate the selection of the Region Service Award.
2. Region committee made up of past Region III Service Award recipients to select the new Region III recipient.

**Tenure:** One year, renewable.

### **Time Line**

1. Every spring each year, prepare a mailing of region service award nomination letter and form.
2. Send reminders to Region III listserv regarding region service award nomination form.
3. By May, coordinate the committee of past Region III service award recipients (two-to-four recommended) to review nominations and decide winner among nominees.
4. By June, submit name of Region III service award recipient to statewide chair of the Awards Committee so the plaque may be ordered.
5. Recommend maintenance of related NYSFAAA documents, to outline Region III membership activities and solicit updates to (at least every two years):
  - Assist the committee selecting Region III Service Award recipient.
  - Assist with the nomination or write-up to present statewide service award.
  - Solicit new committee volunteers to encourage more involvement from inactive and/or new members.

## Article 9992 – Training Committee

**Purpose:** To enhance the professional development for Region III membership.

### **Duties**

1. Develop training programs for budgetary approval each year.
2. Prepare training curricula and materials, as necessary.
3. Schedule training sites and dates to correspond with region meetings.
4. Account to the Treasurer for all Committee expenditures.
5. Professional financial aid trainers are not paid for conducting NYSFAAA training, although their travel expenses are reimbursed. The Region may authorize payment for trainers, as necessary, if they are from outside the profession and demand compensation (prior to the event).

### **Membership**

1. Chairperson
2. Committee members selected by the Chair.
3. Training Calendar Coordinator to work directly with Regional Chairperson.

**Tenure:** One year, renewable.

### **Qualifications**

1. NYSFAAA membership.
2. Interest in professional development and willingness to take the responsibility to ensure meaningful and pertinent training sessions to draw members to region meetings.

### **Time Line**

1. Planning meetings should occur in June or July each year to plan fall training activities and in November or December for spring training activities.
2. As soon as region meeting date/locations are scheduled, set training program.

## Article 9999– Support Office Staff (SOS) Committee

**Purpose:** To plan, develop and implement a training workshop day for support office staff to attend from the regional financial aid offices.

### **Duties**

1. Meet with committee members to discuss agenda and plan for workshop.
2. Work with vendors/lenders to solicit support for the workshop.
3. Contact qualified presenters or training personnel to assist with the training activities planned.
4. Prepare all materials including, but not limited to, invitations and agendas to participants, evaluations, vendor/lender letters, thank you notes, etc.
5. Plan to attend the workshop to help assist with set up, keeping sessions timely, clean up, etc.
6. Follow up the workshop with a committee meeting to discuss evaluation outcomes.

### **Membership**

1. Chairperson
2. There should be at least six other committee members from the region to assist.

**Tenure:** One year, renewable.

### **Qualifications**

1. NYSFAAA membership.
2. Willingness to attend several planning meetings before the workshop.

### **Time Line**

1. Event preferably occurs in March or April of each year.
2. Planning meetings typically begins in early January.

## Article 9999 – Website/Communication Committee

**Purpose:** To publicize Region III events and serve as the regional liaison with the statewide website/Communication Committee.

**Duties**

1. Make recommendations for website content and appearance.
2. Serve as membership liaisons for communicating website developments to the membership and bringing membership suggestions back to the committee.
3. Maintain an up-to-date familiarity with the NYSFAAA website.
4. Provide regional activity information in the form of articles for the Web and via regional listserve.

**Membership**

1. Regional Liaison Representative to statewide committee

**Tenure:** One year, renewable.

**Qualifications**

1. NYSFAAA membership.
2. Familiarity with and access to the web.
3. Awareness of NYSFAAA purpose and goals.
4. Must have e-mail accessibility.

**Time Line**

1. On an as needed basis, directed by the Regional Chairperson.
2. Meet deadlines set for the NYSFAAA Webletter.

Article 9993 – College Aid Awareness Network Committee (CAAN, formerly FAAM)

**Purpose:** To develop, promote, and implement activities of an outreach nature to students and their families concerning the availability of financial aid and the application process.

**Duties**

1. To coordinate a statewide and regional plan to carry out the program.
2. To arrange with statewide CAAN committee a toll-free Hot Line, staffed by NYSFAAA volunteers, who will provide answers to financial aid questions.
3. To assist, coordinate, and provide assistance to regional CAAN activities such as forms workshops, TV/Radio shows, public service ads, etc.
4. To attend at least one planning meeting with all regional representatives.

**Membership:** Chairperson

**Tenure:** One year, may be renewed.

**Qualifications**

1. NYSFAAA membership.
2. Willingness to work with many constituents to bring about the success of the program.

**Time Line**

1. September – Update and mail CAAN materials to high school guidance offices and regional members.
2. October – Deadline for responses to be returned by the end of October.
3. November – Prepare high school listing and update NYSFAAA website with information. Solicit volunteers for open high school nights and CAAN hotline.
4. January/February – Coordinate CAAN hotline activities.