

WASFAA



Handbook for State Presidents

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The intent of this handbook is to help incoming State Presidents have a better understanding of their role on the WASFAA Executive Council.

[This handbook was updated January 2018 and supersedes the previous handbook, “State Presidents’ Group Handbook” which was last revised in April 2011 and is saved in WASFAA archives.]

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WASFAA Handbook for State Presidents

The designees from each of the states in the WASFAA region are an integral part of the WASFAA Executive Council (EC). The role is one of being the primary and voting voice of the members of the state association that is represented.

Purpose of State Presidents as voting members of WASFAA EC

1. To facilitate communication between WASFAA and the membership of each state association in the region.
2. To network with other state presidents and share ideas and concerns.

Responsibilities

1. Communicates WASFAA initiatives, activities and training opportunities to state association members.
2. Keeps WASFAA informed of state association training programs, initiatives, challenges, and successes.
3. Encourages state association members to participate on WASFAA committees and to run for WASFAA offices by mentoring active state leaders.
4. Submits articles to the WASFAA News newsletter
5. Provides quarterly reports prior to WASFAA Executive Council meetings that update the council on the State Association activities and discussions.
6. Actively participates in quarterly State President meetings held prior to each Executive Council meeting.
7. Represents respective state association and serves as a voting member of the Executive Council.
8. Performs other duties as requested by the President and Executive Council.

Membership

1. State Presidents' Chair: Designated by WASFAA President (at a minimum should be experienced EC member). Serves as chair and liaison between EC and State Presidents.
2. Members: State Presidents (or representatives) from each state in the WASFAA region.

Strategic Planning Goals

1. Promote WASFAA membership and training events throughout the states we represent in our state's newsletters and email blasts
2. Talk with other state presidents regarding current issues and trends
3. Continue to develop and set goals throughout the coming year
4. Increase scholarship applications from each state for the various WASFAA events
5. Exchange ideas, information, technologies and specifics of state organizations
6. Exchange ideas with other state presidents by attending another state's conference when possible.
7. Encourage state and regional participation and volunteerism among presidents' state members and WASFAA

Additional Responsibilities, Reminders and Information

1. State presidents are voting members of WASFAA Executive Council (EC). The chair is not eligible to vote.
2. Your input is important and should be provided at WASFAA EC meetings.
3. Plan to speak up and represent your state at the meetings.
4. Provide news from your state in the WASFAA Newsletter.
5. Promote volunteerism for WASFAA within your state.
6. Assist with WASFAA EC nominations from your state.
7. Assist with WASFAA scholarship awards from your state.
8. Assist with WASFAA award nominations.

Meeting Schedules & Times

Please plan to be in attendance for the duration of the each executive council (EC) meeting. Typically runs from 12 noon – 5pm on the first day and 8am to 12 noon on second day. State Presidents meet from 10:30 – 12 noon prior to the general session. Transition meeting may be longer depending on the incoming WASFAA president, for orientation.

1. EC Transition meeting – usually in late winter or early spring
2. June EC meeting - usually coincides w/ Summer Institute. **This is the first Executive Council meeting that you may officially vote and the first EC when the Presidents officially meet together.
3. November EC meeting - may coincide w/ Management & Leadership Institute.
4. EC Transition meeting – usually in late winter or early spring

Note: EC used to meet at WASFAA Conference, so this may start up again in the future.

Travel Expenses That Are Covered

WASFAA will cover the air transportation cost and hotel nights for required Executive Council meetings. It is possible to request additional night(s) at your own expense if you wish to come early or stay longer for personal reasons.

WASFAA **does not** cover the conference registration fee or the hotel nights to attend the WASFAA conference. It does cover the night prior to the EC meeting prior to the conference if there is an EC meeting.

Any meals while traveling to and from meetings and those not covered during the meeting will be reimbursed using the Travel Reimbursement Form. (There is a maximum allowed so refer to the form.)

Transportation

A Travel Response Form, (TRF), will be sent out in advance of the meeting to the EC to complete. **It is important to complete the form and return it as soon as possible.**

If you planned to attend but need to cancel, you must work with the Travel Chair and not the hotel directly, regarding canceling the hotel room. You should send an email to the President and the Travel Chair with the appropriate information as soon as you are aware you will be unable to attend.

Should you not be able to attend or need to cancel, it is highly encouraged that you send your president-elect or another representative from your state. The same situation applies to your replacement:

- Air and hotel is covered by WASFAA.
- The representative should work with the travel chair for air transportation needs.
- The representative has full voting rights as your state's representative.

Ground transportation to and from the hotel paid out of pocket is reimbursable, unless prearranged for the EC. See WASFAA Travel Guidelines on the back of the Travel Reimbursement form, available online at https://www.wasfaa.org/docs/toc_onlineforms.html, for additional guidance.

Reimbursement Process

Following each Executive Council meeting, you should submit a claim for reimbursement of expenses that were not covered by other means (Treasurer paying for airfare in advance, group meals, etc.) within 30 days after travel is completed. The state presidents are sitting council members and do not require a signature on the form before submitting it to the Treasurer for reimbursement.

State Presidents' Meeting

Purpose: To facilitate communication between WASFAA and the membership of each state association in the region; and to network with other state presidents and share ideas and concerns.

A State Presidents' Chair is appointed by the incoming WASFAA president and serves as liaison between WASFAA and each state president. The chair will send out a Call for Agenda prior to each face to face meeting, facilitate and take notes during the meeting, then give verbal report to EC in general EC meeting.

Reports

1. *State Presidents' Chair Quarterly Reports* to WASFAA EC (June, November, February, and April) - Use Committee Report Template under Online Forms. The report should be done 2 weeks prior to each WASFAA EC meeting and is only necessary when the State Presidents' Group has had activities between EC meetings.
2. *State President's Individual State Quarterly and Year-End Reports* to WASFAA EC-Provide information on what is going on in your state association, state activities related to financial aid, etc.

WASFAA Newsletter

You should provide an article on what is going on in your state association; share ideas on activities and/or highlight what an aid office is doing to provide good customer service, streamline processes, implement imaging, etc. or highlight one of your state association members each time a newsletter is published. State activities, highlighting state members and schools and other areas of interest to the WASFAA membership. You can ask someone on your state council to create the newsletter article if you wish. Deadlines: See newsletter information on website.

Forms

1. Travel Reimbursement Form – available on the WASFAA web site.
2. WASFAA State President's Report Form for State President's Report to WASFAA EC – sent out by WASFAA's president prior to each EC meeting.