

SAMPLE FORMAT

FASFAA POLICY AND PROCEDURE MANUAL	
3. FINANCIAL INFORMATION	OPERATING BUDGET
Effective Date	Policy
	Page of

Chapter Number & Name

Name of Policy or Procedure

Effective date of policy or procedure
or most recent publication date.

Page number and total number of pages
in the policy or procedure

Number of Policy or Procedure

COPYRIGHTED FASFAA PUBLICATIONS

<u>Name of Publication</u>	<u>Date Copyrighted</u>
President's Survival Guide	1996
30 Years of FASFAA	1996
25 Years of FASFAA	1993
Yellow Pages	12/91
Handbook of State Student Financial Assistance	12/91
Legislative Handbook	12/91
High School Guidance Counselor Resource Book	1990
FASFAA Brochure	1988
Solving the Financial Aid Puzzle Poster	1985

OFFICIAL FASFAA LOGO



Adopted 1988-89

FASFAA Proposed Budget Worksheet

To prepare the association's final operational budget each year, use the [Sample Budget Worksheet](#) from the FASFAA website Governing Documents.

Guide to Association Budget

The president may also use the [President-Elect, President and Past President Master Calendar](#) from the FASFAA President OneDrive folder as a tool to assist in planning for each year in office. This document also contains the Preparation of the Final Operational Budget previously in the Appendix.

APPENDIX 4.1.1

Software Owned by FASFAA

- 1. QuickBooks
- 2. Standard Microsoft Office packages

Hardware Owned by FASFAA

Laptop	Electronic Services
Laptop	Chair
Laptop	Secretary
Laptop	Bookkeeper
Laptop	Bookkeeper
Printer	Bookkeeper
Printer	Bookkeeper
Printer	Clock Hour Chair
Printer	Clock Hour Chair
Printer	Clock Hour Chair
iPad	Bookkeeper

APPENDIX 4.1.2

Software/Hardware Borrowing Agreement

The Software and/or Hardware indicated below are borrowed for FASFAA business and will be used solely for the purpose stated below. In recognition of copyright laws, this Software will not be copied or used in any way, which would infringe on the copyright. The form can be found on the FASFAA website in the FASFAA Forms/Documents page or [here](#).

GENERAL EXPECTATIONS OF BOARD MEMBERS

General: As a board member, you are considered to be a leader in the financial aid profession and as a leader, are expected to set an example for all members of the Association and for external constituencies.

Each board member is responsible for obtaining pertinent information or files, which his or her predecessor may have accumulated that would be of assistance in performing the duties of the position.

Meetings: Please make every effort to attend all board meetings and stay through the end of the meeting. All eligible expenses related to attendance at a board meeting will be paid by FASFAA, with the exception of travel expenses when a board meeting is held in conjunction with another FASFAA workshop or conference. In the event that you cannot attend, please contact the president as soon as you know, so that your hotel room can be canceled and the agenda can be adjusted, if necessary. While you are free to ask someone else to attend the meeting in your absence, you cannot turn your vote over to someone else.

To keep travel expenses for the board as reasonable as possible, all rooms will be booked as double rooms, sharing with another board member. If you elect to take a single room, FASFAA will not reimburse you for the additional expense.

Reports: All reports to the board should be in written form. Please email the board copies of your report prior to each board meeting.

All reports should be in two sections: report of activities/information items and action items. In order to complete the agenda within one day, only action items will be brought to the table for discussion, unless a board member has questions or requests discussion about the items in the information section. Board members are expected to attend the entire meeting and participate fully in the discussion of any topics brought before the board for discussion.

For the first board meeting, all individuals should be prepared to speak, whether or not there are any action items. You should outline your objectives and seek input for the board for other ideas and suggestions for reaching the goals outlined during the retreat.

Newsletters: All board members and committee chair are expected to provide an article for each newsletter concerning his or her area of responsibility. You may also provide any additional article you would like to submit.

Legislation: All board members should be actively involved in responding to all pertinent state and federal legislation and regulations that arise during the year. This is a responsibility of all FASFAA board members, not just the federal and state relations committees.

Committee

Makeup:

Within certain limitations, you are free to select the members of your committees. Every effort should be made to ensure that you have representation from all relevant sectors, that you have statewide representation, if appropriate, and that you include members with diverse ethnic and cultural backgrounds. Make every effort to include members who have volunteered to serve. These are people that want to get involved, and we should make use of their interest and enthusiasm. We owe it to the Association to give new people a chance to show what they can do. Please involve them.

Committee members should serve on only one committee, so that we can involve as many members as possible. This will not always be possible, as some committees will have an overlap of responsibilities.

Policies and

Procedures:

As a board member or committee chair, you are responsible for adhering to and updating your section of the policy and procedure manual. If you have any suggested changes, please bring them before the board and implement them.

TRAINING COMMITTEE

Examples of Training Activities

Training activities have included, but are not limited to:

- Beginning Aid Officer Workshop
- Support Staff Workshop
- Experienced Aid Officer Workshop
- Drive In Workshop
- The Yellow Pages
- FSAG Manual

FASFAA
 Budget Estimate / Request Form

Note: An updated form is available in the OneDrive→Documents→General→Conference Committee folder or Documents→General→Training Committee folder

Purpose and Routing: This form is to be used by any committee, which expects to have expenses and *does not* have its own budget category. Committee chairs must submit this completed form to the President for approval. The Treasurer establishes the budget, keeps the original, and mails a copy to the committee chair.

Committee Name	Committee Chair
Number of Committee Members	Institution
Number of Meetings Expected	Address
Primary Goal of Committee	Address
	Telephone/Fax/E-mail

I. Estimated Expenses for Year (July 1 – June 30)

A. Travel (i.e., airfare, mileage, lodging, meals)

Chairperson	\$ _____
Committee Members	\$ _____
Total	\$ _____

B. Supplies and Materials (please itemize)

	\$ _____
	\$ _____
	\$ _____
Total	\$ _____

C. Postage

\$ _____

D. Other Expenses (please itemize)

	\$ _____
	\$ _____
	\$ _____
Total	\$ _____

TOTAL EXPENSES: \$ _____

II. Estimated Income/ Revenue for Year (NOTE: Workshops require an individual budget in addition to the estimate provided here.)

A. Activities or Projects (please itemize)

	\$ _____
	\$ _____
	\$ _____
Total	\$ _____

B. Sponsorship Expected (please itemize)

	\$ _____
	\$ _____
	\$ _____
Total	\$ _____

TOTAL INCOME/REVENUE:

\$ _____

Signature of Committee Chair

Date

Signature of President

Date

SPECIAL PROJECTS

Examples of Special Projects completed:

- Rewriting of the Policy and Procedure Manual
- Assembling historical information needed to write the xx history of the Association
- Investigating the ability to offer professional liability insurance to our members

RESEARCH COMMITTEE

Research Activities

- | | |
|---------|--|
| 1983-84 | Study to determine whether or not FASFAA should continue certification activities. |
| 1984-85 | Compilation of FASFAA history. |

FASFAA CERTIFICATIONS

Members Holding FASFAA Certification

Spring, 1977:

Bill Armstrong, Doris Batsel, Larry Benson, Bill Gentry, Helen Glenn
George Goldsmith, Ron Hammond, Rufus Jefferson, Marilyn MacGuire, Thomas
Mahoney, Steve Pritz
Dan Smith, Liz Sweeney

Spring, 1978:

Larry Arnold, Karen Fooks, Gwyn Francis, Margaret Frost, Dave Hartshorn, Bob
Kruntorad, Judith Marty, Carrie Tutson

Spring, 1979:

Jack Agett, Thomas Calhoun, Barbara Kay, Janis Gard, Diane Harrison
Elizabeth Maguire, Margaret Morris, Preston Rosser, Shirley Tarr

Fall, 1979:

Linda Downing, Helen Fraed, Sandra Inge, Marge Kaczynski, Alton Royal

Spring, 1980:

Judith Berson, Hamid Faquire, Emilio Garcia, Gail Janssen, Jim Kennedy
George McCowan, Ronnie Oard

Spring, 1981:

Claudia Geary

Spring, 1982:

Lunita Knox-Shearer, Robert Sterling, Michael Wernon

Spring, 1983:

Darrill Simonson

Bonnie Long Pirkle

May 31, 1941 – August 31, 1994

Bonnie grew up in South Carolina and Georgia in a very close-knit family. Each summer the entire family would gather for a week together at the beach in South Carolina, a tradition which began in Bonnie's childhood and continues on. It was one of her favorite places to be.

She began her professional career after she had already had her two children. Bonnie's life in financial aid began when she accepted a position at Hall School of Nursing in Gainesville, Georgia in 1970. There she rose from the Nursing Department's secretary to Director of Student Services. During that time she mastered both financial aid as well as admissions and traveled throughout the area recruiting students. She was instrumental in helping obtain federal eligibility in anticipation of the merger with Brenau College in 1978 and became the new institution's Director of Financial Aid. She earned her baccalaureate degree there while working full-time. A special place in her heart was always reserved for nursing students because of her experience at Brenau College/Hall School of Nursing.

Bonnie came to Florida in 1980 upon accepting a position at Daytona Beach Community College, where she was Assistant Director until 1984. She then moved on to Director of Financial Aid positions at Central Florida Community College until 1987 and at Seminole Community College until 1992.

It was in 1992 that she accepted the position of Marketing Manager for Chase Education Finance Center. In that position she was responsible for serving schools in four states in the southeast. As a traveling representative, she was able to use her best talents and was able to make friends in financial aid offices throughout the southeast.

Throughout her career Bonnie made time for additional professional activities. Her two favorite activities were coordinating training activities and planning financial aid conferences. She served FASFAA in these capacities as well as in many other roles over the years. In addition, she was active in the Florida Association of Community Colleges (and served as its Financial Aid Commission Chair in 1992); the Florida Council of Student Financial Aid Advisors; Southern and National Associations of Student Financial Aid Administrators (SASFAA and NASFAA); and conducted program reviews of federal nursing loan programs for the Department of Health and Human Services.

Bonnie was known as a hard-working professional who could always be counted on; as someone who was knowledgeable about any financial aid topic; as someone who truly cared about students and her colleagues; as someone who could never say "no" to a request from anyone who needed her help.

Many adjectives come to mind when describing Bonnie as a person – vivacious, perky, bubbly, caring, thoughtful, fun-loving, warm, welcoming, smiling – but perhaps the one which best describes her is special. To those who came into contact with her, she was special in every way and she made everyone around her feel special too. Bonnie is well-remembered at FASFAA conferences for making every event more fun; for making new people feel welcome and comfortable; for extending herself even at the expense of her own well-being; for her love of dancing; and her role in arranging the most enjoyable social events at conferences.

Her life was too short. She became ill while traveling to the NASFAA annual conference in 1994 and within seven weeks she was gone from the lives of all who knew her. Although her illness was sudden, those few weeks enabled her friends and colleagues to express to her how much she had meant to them. She received literally hundreds of cards, letters, and gifts from her financial aid "family." Colleagues from several states traveled to South Carolina for a memorial service in her honor. She had touched the lives of so many individuals who felt her loss so greatly and there was a tremendous outpouring of sympathy.

Because of her extensive role in education, many of her friends and colleagues wanted to remember her through a scholarship program. Many donations were made to a scholarship program, which benefits Brenau College nursing students. In fact, the Vice President who acknowledged the gifts noted that in twenty years he had never seen such an outpouring of memorial gifts in one person's honor. FASFAA also wanted to honor Bonnie in some way because of her outstanding contribution to the association and to students. The establishment of the Bonnie L. Pirkle Memorial Scholarship Program was met with a standing ovation from members that Bonnie's memory will be kept alive by helping deserving students.

Bonnie Pirkle left behind her parents, Laurie and Jesse Long, her siblings Linda and Steve, and her children, Chris and Robert and their families, and a host of friends who considered themselves her extended family. She touched the lives of everyone who knew and loved her – from students who benefited from her personal attention and wisdom; to colleagues she welcomed to association activities; to today's financial aid leaders she taught at workshops; to friends who enjoyed being with her. Bonnie's spirit resides in every FASFAA member whose life she touched.

Bonnie L. Pirkle Memorial Scholarship Mission Statement

The Florida Association of Student Financial Aid Administrators as a commitment to provide, from its own resources, financial assistance to enable deserving students to benefit from higher education, established the Bonnie L. Pirkle Memorial Scholarship. The scholarship was also created as a means of recognizing the FASFAA President's institution for his or her service to the association. The scholarship was named in honor of Bonnie L. Pirkle, a long-time FASFAA member who exemplified the highest personal and professional qualities and who embodied the spirit of camaraderie of financial aid administrators in Florida. As a memorial fund, the scholarship also honors assistance and thereby fulfill their educational goals. FASFAA hopes that the awarding of this scholarship will also increase the visibility and enhance the image of financial aid administrators in the State of Florida.





[DATE]

TO:
ADDRESS:
CITY, STATE, ZIP

[GREETING]

On behalf of the Florida Association of Student Financial Aid Administrators (FASFAA), I would like to offer my sincere appreciation for your contribution of \$[AMOUNT] in remembrance of Bonnie L. Pirkle.

We will credit your gift to the [Bonnie L. Pirkle Memorial Scholarship](#), which will, in perpetuity, provide scholarships for deserving students attending Florida institutions. As an association, we feel that this is a fitting tribute for a member who devoted her professional life to helping students.

Again, thank you very much for your generosity.

Sincerely,

[NAME]
FASFAA President

Re: Donation Thank You Letter



[INSTITUTION NAME]
[DIVISION/UNIT]

[DATE]

TO:
ADDRESS:
CITY, STATE, ZIP

[GREETING]

As Immediate Past President of the Florida Association of Student Financial Aid Administrators ([FASFAA](#)), it is my pleasure to inform you that the [Bonnie L. Pirkle Memorial Scholarship](#) will be awarded to **[STUDENT NAME]**, a very deserving student who is attending [INSTITUTION].

FASFAA is a professional organization of approximately 900 financial aid administrators from colleges and universities, as well as associate members from the community who participate in the financial aid throughout the state of Florida. This scholarship is funded solely by members of this organization, and honors the late Bonnie L. Pirkle, a long time FASFAA member, who exemplified the highest professional and personal standards of a financial aid administrator.

The Bonnie L. Pirkle Memorial Scholarship also honors your own [FASFAA ELECTED OFFICER, INSITUTION TITLE] who serves on as an elected officer our current FASFAA Executive Board. This gift is intended as an expression of appreciation by the membership to both [FASFAA ELECTED OFFICER NAME] for HIS/HER outstanding contributions of time, talent and energy to the organization this year, and to [INSTITUTION NAME].

The membership wishes to thank [INSTITUTION NAME] for its contribution to the financial aid profession by supporting [FASFAA ELECTED OFFICER NAME] in fulfilling HIS/HER responsibilities as [ELECTED OFFICER ROLE]. Without that vital endorsement, the successes we have experienced this year would not have been possible.

A check for [DOLLAR AMOUNT], made co-payable to [INSTITUTION NAME] and **[STUDENT NAME]** will be forwarded to your business office after July 1, but no earlier than thirty days prior to the beginning of your fall term. [FASFAA IMMEDIATE PAST PRESIDENT] will notify the FASFAA Treasurer of the date the check is to be drawn. Once again, on behalf of the **Florida Association of Student Financial Aid Administrators**, thank you for your continued support.

Sincerely,

[NAME]
FASFAA Immediate Past President

Re: Letter to Institution on behalf of Board Member



[DATE]

TO:
ADDRESS:
CITY, STATE, ZIP

As President of the Florida Association of Student Financial Aid Administrators (FASFAA), it is my pleasure to inform you that the Bonnie L. Pirkle Memorial Scholarship will be awarded to **[STUDENT NAME]**, **[STUDENT INSTITUTIONAL ID NUMBER]**, a very deserving student attending your institution.

Enclosed is a check for [DOLLAR AMOUNT], made co-payable to the school and is to be used for educational expenses. The student must be a U.S. citizen or eligible non-citizen, degree seeking, and enrolled in the [SCHOOL YEAR].

If the student is no longer attending your institution or otherwise ineligible, please return the funds to:

FASFAA
4905 34th Street South, POB #334
St. Petersburg, FL 33711

Sincerely,

[NAME]
FASFAA President

Re: Bonnie Pirkle Letter Accompanying Check to Schools



Statement of Compliance

I hereby certify my agreement to conduct the business of the Executive Board in compliance with existing FASFAA policies and procedures. I understand that any financial activities associated with this office are solely restricted to the conduct of official FASFAA business, and in no way shall funds from the FASFAA treasury be used for personal or other purposes. FASFAA credit card holders are authorized to make purchases on behalf of the Association that are within the approved budget for the year.

Board Member Name _____

Wet Signature/DocuSign _____

Date _____



Florida Association of Student Financial Aid Administrators Bookkeeper

Reports To: Treasurer and Treasurer-Elect

Position Summary

The Bookkeeper supports the fiscal integrity of FASFAA by maintaining accurate financial records and assisting the Treasurer and Treasurer-Elect with accounting, reporting, and compliance functions. This role ensures timely recording of transactions, reconciliation of accounts, and adherence to approved budgets and financial procedures.

Key Responsibilities

- Maintain complete and accurate fiscal records of the Association in coordination with the Treasurer and Treasurer-Elect.
- Record all financial transactions in QuickBooks, including income, expenses, budget entries, and adjustments.
- Record the approved and working annual budget in QuickBooks and assist with determining appropriate allocation of expenses to budget lines.
- Deposit physical checks and ensure timely transfer of credit card payment deposits to the Association's bank account.
- Reconcile paid membership counts with membership records maintained by the Bookkeeper.
- Manage credit card reconciliation, including:
 - Recording expenses once the account is paid by the Treasurer;
 - Matching monthly statements with receipts;
 - Following up with individuals regarding missing receipts;
 - Coordinating reimbursements to the Treasurer for non-FASFAA charges.
- Participate on the conference committee and assist with financial aspects of conferences and events.
- Process event registration cancellations and issue refunds as appropriate.
- Provide donation receipts upon request.

- Work closely with the Scholarship/Charity Chair and Treasurer on the administration of the Bonnie Pirkle Scholarship.
- Assist with transition activities for incoming Treasurers, including participation in a one-day financial review session with the Treasurer-Elect and outgoing Treasurer to review ledgers, banking relationships, accounting procedures, and transition timelines.
- Support the external accountant with preparation and submission of tax filings and audit-related documentation.

Term and Transition Support

The Bookkeeper supports continuity by assisting with Treasurer transitions within 30 days of the start of the new term. Meetings may be conducted virtually or in conjunction with scheduled transition meetings.

Qualifications

- Experience with nonprofit or association bookkeeping preferred
- Proficiency in QuickBooks
- Strong attention to detail and ability to meet deadlines
- Ability to handle confidential financial information professionally
- Strong communication and collaboration skills

Salary

\$1,100 per month