

CONFERENCE COMMITTEE

SCOPE AND PURPOSE

The CASFAA Conference Committee became a standing committee of the Association at the direction of the 1972-73 Executive Council. The purpose of the annual conference is to assemble the membership at a site designated by the Executive Council during which the annual business meeting of the association is conducted, professional development opportunities with an emphasis on financial aid procedures and current issues are provided, and the community is afforded an occasion and environment to review, evaluate and recommend direction about the critical issues facing the Association and the profession. (The conference is alternated annually between the northern and southern regions of California.)

The annual conference has been held each year since 1972 for a three-day period in late November to mid-December. Since 1980, the newly elected Executive Council has commenced leadership responsibilities on the final day of the annual conference. The Conference Chair of the subsequent year's Conference Committee is appointed no later than the first meeting of the Executive Council following the annual conference.

The success of the annual conference is measured by the written evaluations by conference attendees and by the amount of profit generated by the conference. Historically, excess revenue from the conference has been used to support the training and operational goals of the Association.

CHARGE OF THE CONFERENCE COMMITTEE

1. Secure volunteers to chair conference subsidiary committees.
2. Develop an agenda for the annual conference that is timely, promotes dialogue, and enhances the knowledge of the membership in relation to the administration of the financial aid programs.
3. Inform the membership of the date, time, location, and expense of the annual conference and promote attendance through the CASFAA Newsletter, electronic media, pre-registration materials and individual mailings.
4. Secure presenters, moderators, facilities and equipment necessary to support general meetings and training sessions for the conference.
5. Develop a budget and conference fees, which must be approved by

Executive Council in order to secure sponsors for conference events, to ensure that excess revenues from the conference will be available to help support the annual operating expenses of the Association.

6. Direct the activities of the conference.
7. Report to the Executive Council and to the Executive Council Liaison on conference planning and submit a final written report.

CHARGE OF SUB-COMMITTEES

The Conference Committee is composed of a number of sub-committees appointed to carry out specific functions related to the organization of the annual Conference. All sub-committee activities should be coordinated in consultation with the Conference Committee Chair. Conference sub-committee chairs are directed by the Conference Chair to secure volunteer Association members to perform the general functions described below:

A. Secretary:

1. Take minutes of all Conference Committee Meetings.
2. Distribute Conference Committee minutes to Conference Committee and President.
3. Maintain Committee Roster
4. Notify committee members of meeting time and dates and provides directions and parking information to committee members.

B. Program Committee:

1. Develop program content utilizing input from a wide range of sources including: CASFAA Federal and State Issues committees, the U.S. Department of Education, other CASFAA committees (Training, Minority Issues a.k.a. Ethnic Diversity, etc.), the California Student Aid Commission, and other agencies, institutions and/or organizations that interact with the CASFAA community on issues related to the administration of financial aid.

2. Develop interest sessions, including written descriptions of sessions and session titles.
3. Work with the Publicity and Printing Chair in the development and coordination of all written materials for the program.
4. Coordinate program content with other events (e.g., major speakers, social events).
5. Procure speakers/presenters and audio visual equipment. Coordinate with Facilities Committee to ensure meeting rooms are appropriately equipped. See Appendix K for Moderator/Presenter Guidelines.
6. Prepare post-conference report.

C. Finance Committee - Treasurer:

1. Develop and distribute conference reimbursement forms for committee members.
2. Establish accounting method and conference checking account.
3. Develop procedures for processing pre-registration payments.
4. Coordinate with Registration Committee regarding payment procedures prior to, during and after the conference.
5. Prepare a planning budget and update as planning progresses.
6. Prepare a post-conference report.
7. Have checkbook at Conference.

D. Publicity and Printing Committee

1. Prepare CASFAA Newsletter articles and other CASFAA Conference publicity materials.

2. Develop all printed conference materials including pre-registration materials, registration materials, program, meal tickets, and evaluation forms.
3. Work with other committee chairs to coordinate their printing and publicity needs.
4. Work with Facilities Chair and Program Committee to develop informational and interest session signs for the conference.
5. Prepare post-conference report.
6. Work with President to prepare annual awards brochure.

E. Sponsors and Vendors Committee:

1. Obtain sponsors' and vendors' financial commitments to support activities of the conference. See Appendix K for sample Sponsor/Vendor policy and benefits.
2. Develop a payment plan which provides incentives for advance payments of those commitments.
3. Develop recognition mechanisms for sponsors and vendors and other conference contributors.
4. Make arrangements for vendors' displays including determining space availability, tables, drayage and electrical needs.
5. In consultation with the Registration Committee, coordinate pre-registration and on-site complementary registrations for sponsors and vendors.
6. Prepare post-conference report.
7. Serve on CASFAA's Fund Development Committee
8. Assist in Coordination of Fund Development requirements with Conference Chair and CASFAA Fund Development Committee.

At the discretion of the Conference Chair, the following duties will be assigned to either the Social and/or Facilities Chair.

1. Coordinate space requirements for social events with Program and Facilities Committees.
2. Devise mechanisms for predicting meal attendance and securing meal counts.
3. Plan and arrange menus.
4. Plan Executive Council and President's Receptions.

F. Social Chair

1. Plan and coordinate all meal and entertainment functions.
2. Organize appropriate entertainment and determine locations and other requirements of social events.
3. Work with Sponsors and Vendors Committee to determine sponsored meals.
4. Obtain information and/or develop various guides for conference attendees with regard to local shopping, entertainment and restaurants.
5. Work to coordinate special projects with Special Projects Committee.
6. Prepare post-conference report.

G. Facilities Committee:

1. Coordinate space requirements for events with Program and Social Committees.
2. Coordinate room assignments for interest and general sessions and meals with Social, Registration and Program Committees.
3. Coordinate audio visual requirements with the hotel and the Program Chair to ensure proper equipment

is in place for each session including microphones, overhead projectors, and equipment for taping.

4. Work with Conference Chair to provide pre-registration information about guest rooms and services.
5. Work with other committee chairs and hotel staff to provide any special facilities.
6. Work with Conference Chair to coordinate assignment of complementary sleeping rooms.
7. Work with Program and Publicity Chairs to print and display signs for interest sessions.
8. Prepare post-conference report.

H. Registration Committee:

1. Develop pre-registration schedule and procedures.
2. Prepare and mail registration packets.
3. Prepare for and staff on-site registration.
4. Utilize automated system for keeping registrant count, location, and other information.
5. Provide supplies for registration including typewriters, telephones, tacks, staples, tape, etc.
6. Coordinate registration functions with Facilities Chair.
7. Coordinate message board.
8. Assist Treasurer in establishing a mechanism for receiving conference payments before, during, and after conference.
9. Arrange for and train staff to work registration area before and during conference.
10. Prepare post-conference report.

11. Work with Treasurer in Refund Requests.
12. Provide to Facilities information regarding registration to assist in room assignments

I. Major Speakers Committee

1. Develop list of possible keynote and other major speakers.
2. Correspond with and secure all conference/major speakers.
3. Provide logistics and protocol for speakers.
4. Coordinate with Registration Chair for complementary speaker registrations as needed.
5. Coordinate with Conference and Facilities Chairs for speakers' complementary sleeping room as needed.
6. Arrange for media coverage, as appropriate.
7. Prepare post-conference report.

J. Transportation/Special Projects and Events/Evaluation Committee:

1. Prepare and provide good local maps for conference location city.
2. Provide information about airport and hotel shuttle services.
3. Develop informational materials on local transportation.
4. Make arrangements for conference airlines and rental cars.
5. Coordinate parking arrangements for hotel guests and commuters.
6. Coordinate guest speakers' transportation arrangements with Major Speakers Committee.

7. Coordinate Fun Run logistics and T-shirts, if appropriate.
8. Create evaluation mechanism for publicity, interest sessions, facilities, food, etc. Tabulate and report findings in narrative and statistical formats to Conference Chairs.
9. Prepare post-conference report.

SELECTION, COMPOSITION AND SIZE OF THE COMMITTEE

A. Conference Committee Chair:

The Chair is solicited and appointed by the President of the Association. Preference in selection is given to individuals in close proximity to the conference site who have conference committee experience and/or individuals who have the support of their institutions and demonstrated ability to organize and manage complex functions and large numbers of volunteers. The Executive Council must endorse the Committee Chair selected by the President.

B. Conference Committee Members:

The Conference Committee consists of the Conference Chair, Sub-Committee Chairs, a Secretary, and the President-Elect.

C. Sub-Committee Chairs:

Sub-Committee Chairs are solicited and appointed by the Conference Chair from individuals in close proximity to the conference site who are interested or experienced in working with conference committees. Preference is given to individuals who have the support of their institutions and specific interest or talent in the area of responsibility of the committee.

D. Sub-Committee Members:

Sub-Committee Members are solicited by the Sub-Committee Chairs from interested individuals in accordance with committee composition guidelines of the Association. The Conference Committee should be

composed of members from each of the five institutional segments.

E. Committee Size:

The Conference Committee includes the Chair, Secretary, the President-Elect and all Sub-Committee Chairs. The full Conference Committee size is dependent on the tasks associated with sub-committees that may range in size from one to 20, depending on the requirements of the committee and the preference of the Chair.

COMMITTEE MEETINGS

- A. The Conference Chair and Sub-Committee Chairs normally meet on a monthly basis throughout the year preceding the conference or as needed to accomplish planning and confirm arrangements.
- B. Sub-Committees meet at the discretion of the sub-committee chair, as necessary to accomplish planning and confirm arrangements.

FINANCIAL RESPONSIBILITY

- A. The Conference Committee Chair, in conjunction with the Treasurer, is responsible for the Conference Committee's Budget. The Conference Budget does not include the cost of conference registration fees for any members of the committee, the committee chair, nor any officer of CASFAA. Conference fees are waived for invited guests and lifetime members identified by the President of the Association.
- B. All conference expenditures are authorized by the Conference Chair and paid by the Treasurer. All sessions conducted within the time frame of the conference are paid for by the Conference Committee. The Conference Committee will also pay for one microphone and one podium for each of the Segmental meetings. All other expenditures must have a separate budget approval by the Executive Council. These include, but are not limited to:
 - a. The GP Forum and Reception
 - b. The President's Reception
 - c. The Awards Brochure

- d. Costs associated with the CCCSFAAA Conference
 - e. Costs associated with Segmental meetings except those agreed to by the Conference Chair
- C. A final report of revenues and expenditures is prepared for the Executive Council immediately following the conclusion of the conference. This report should be presented at the second Executive Council meeting (usually held in February/March).

POST CONFERENCE MEMBERSHIP POLICY

The CASFAA Bylaws state that the membership year begins January 1 and ends the following December 31. In practice, the year begins at the end of the annual conference that is usually held in early/mid December. Although most people join the Association for the next membership year, sometimes a person applies for membership after the start of the membership year.

Anyone becoming a member after the annual conference must send a completed membership application (a photocopy is acceptable) or a letter with all pertinent information along with a check for the amount of the current annual dues to the CASFAA Treasurer. The Treasurer will receipt the funds. The Membership Services Committee Chair will ensure that the membership information is included in the CASFAA database and send the new member acknowledgment materials. (New member acknowledgment materials include: a copy of the President's letter, a CASFAA Directory, and a copy of the latest edition of the CASFAA Newsletter.) If the membership application is received late in the year, the Membership Services Chair may contact the individual and suggest that s/he waits until the new year. If the late applicant wishes to wait until the next year, the Treasurer must advise the individual that, if s/he waits, s/he will not be able to vote in any upcoming elections. If the person is interested in attending the next CASFAA conference, his or her name and address should be sent to the Conference Committee Chair.

REPORTING

Because the annual conference is the largest expense and revenue generating event of the Association, the Conference Chair is in regular communication with the President and the Executive Council regarding planning. The Chair prepares a report for each

Executive Council meeting and obtains a report from each Sub-Committee Chair for contribution to a general report to the Executive Council at the conclusion of the conference.

HISTORY OF THE CONFERENCE COMMITTEE

The CASFAA conferences have been held annually since 1972.