

NeASFAA Board of Directors Meeting  
Wednesday April 15, 2015, Holiday Inn, Kearney

Present: Matt, Kent, Stacy S, Wendy, Gina, Mary, Lani, Linda, Stacy D, Sheila, Bailey, Marty, Kay, Renee, Beth, Becca, Erin, Hylee, Ritchie, Sara, Andrew

Matt called meeting to order at 1:07 pm.

Bailey moved to approve agenda, Erin seconded. Agenda was approved.

Wendy moved to approve minutes, Stacy D seconded. Minutes approved.

Kay moved to approve online minutes, Marty seconded. Minutes approved.

#### Officer Reports

President: written report attached

President Elect: written report attached

Past President: no report

Treasurer: written report attached

Secretary: no report

Historian Report: written report attached

Discuss Apply2College at sector meetings

#### Sector Representative Reports

Private Career: no report

Two-year Public Institutions: no report

Private Colleges and Universities: no report

Four-year Public Colleges and Universities: no report

Associate Membership: no report

#### Committee Reports

Professional Development Committee: written report attached

Welcome special guests, vendors and new members.

Nominations and Elections: no report

Membership: written report attached

Finance and Audit: written report attached

Corporate Development: written report attached

Nelnet is giving \$500 for the philanthropy.

Communications: written report attached

Awards: no report

Association Governance: no report

State Legislation Task Force update

Template for student success stories in dropbox

#### Continued Business

Look at examples of new membership application forms and renewal notices

Renee would like to see a specific form for each school with individual names and voting member could check off who is still there and add new employees.

Discussion on Sector Reps as members of MC and how to handle revised committee structure and current vice-chairs

Maybe need a website coordinator/master.

Table to Kay's board; wait a year to see how new committee functions

Topic of conversation for sector meetings

P&P language regarding PDRC referring training calendar back to Membership Communications

Bailey moves to add language to P&P pending the approval of the by-laws, Wendy seconds. Motion approved.

P&P language regarding Ordering Awards

Andrew moves to add "PDRC is responsible to order the awards" to P&P pending approval of the by-laws, Stacy D. seconds. Motion approved.

#### New Business

Budget Approval

Projected income for spring conference is budgeted for more because of location; it will be in Lincoln in 2016, but meals will be more expensive.

Kay moves to approve proposed budget. Erin seconds. Motion approved.

Sector Reps New Member Form

Discussion on what was done in the past; Bailey described what was sent out when she was communications chair.

Send template to new sector reps

Ritchie thought maybe would be good idea to send to everyone; start with board.

Assign Sector Reps discussion points for sector meeting.  
Apply to college discussion  
Listing sector reps as new MC committee  
New Member questions

Remind new members to sign conflict of interest

Bailey moved to adjourn, Marty seconded. Meeting adjourned at 3:26 pm.

Agenda  
NeASFAA Board of Directors Meeting  
Wed April 15<sup>th</sup> @ 1pm  
Kearney Holiday Inn

Call to Order

- I. Approval of Agenda
- II. Approval of minutes from February 2015 meeting
- III. Approval of Online Vote minutes from Mar 2015
- IV. Officer Reports
  - A. President, Matt Johnson
  - B. President Elect, Kay Dinkelman
  - C. Past President, Tom Ochsner
  - D. Treasurer, Marty Habrock
  - E. Secretary, Bailey Jorgensen
- V. Historian Report
- VI. Sector Representative Reports
  - A. Private Career, Andrew Landrum
  - B. Two-year Public Institutions, Stacy Dieckman
  - C. Private Colleges and Universities, Wendy Matulka
  - D. Four-year Public Colleges and Universities, Erin Moran
  - E. Associate Membership, Stacy Seim
- VII. Committee Reports
  - A. Professional Development Committee, Mary Sommers
  - B. Nominations and Elections, Kay Dinkelman
  - C. Membership, Shareen Thewke
  - D. Finance and Audit, Hylee Asche
  - E. Corporate Development, Stacy Seim
  - F. Communications, Linda Butcher
  - G. Awards, Sara Bennett
  - H. Association Governance, Tom Ochsner
  - I. State Legislation Task Force update, Stacy Dieckman
- VIII. Continued Business
  - A. Look at examples of new membership application forms and renewal notices
  - B. P&P language establishing Sector Reps as members of MC committee -- Action Item 1
  - C. Discussion on how to handle revised committee structure and current vice-chairs for Communications Membership.  
IDEAS
    - a. Secretary Chairs Committee
      - i. Perhaps assigns membership renewal process to each sector rep to contact own sector for renewal
      - ii. New member apps to the secretary
      - iii. Assigns or manages web updates
    - b. Outside Chair/Vice Chair Setup
      - i. Assigns tasks to sector reps as deemed appropriate
      - ii. Might be good for this year as established process is determined
    - c. Rotating Chair/Vice Chair within the rotating sector rep structure
  - D. P&P language regarding PDRC referring training calendar back to Membership Communications – Action Item 2
  - E. P&P language regarding Ordering Awards – Action Item 3
- IX. New Business
  - a. Budget Approval
  - b. Sector Reps New Member form.
  - c. Assign Sector Reps discussion points for sector meeting.
  - d. New board signing of Conflict of Interest Statement.
- X. Adjournment

President's Report – April 15, 2015

On March 2<sup>nd</sup>, per the Nebraska Legislative Task Force request, I testified before the Education committee in Lincoln on behalf of the NeASFAA. Joining me that day were some other NeASFAA members representing their schools including: Mary Sommers, Vicki Kucera and Deana Unger. The testimony we provided that day was in support of LB355. This bill would allow for the continued use of lottery funds at the same levels we currently receive for the Nebraska Opportunity Grant. I was very pleased that the task force asked me to testify and for their assistance with my preparation. It made me extremely proud that NeASFAA was at the table and able to have its voice heard that day. One take away for future consideration was that we could have been more well-rounded in our approach by having prepared testimony for all of the bills that impacted the lottery funds. This would mean not just voicing support for the one bill, but also speaking against the other bills presented that day that may have a negative impact on the lottery funds for the state grant program. The testimony would not have to be long, but I think it important to have opponents on the record, countering the proponents. I considered briefly doing this, but knew I could not, since I did not have the task force and board blessing to do so.

At the last board meeting we determined that we wanted to do some editing of the officer's descriptions/duties section of the Bylaws. With the assistance of the Association Governance Committee, we were able to redraft the officer's section of the bylaws. Our hope in the redrafting was to remove any delegation of committee responsibilities and at the same time make sure any remaining language was also not overly prescriptive of duties in general, but rather a description of the office and things that would likely always remain true for that office. I thank AG and the board for vetting this and approving this so that we could present it to the association.

My hope is that, we are as prepared for the association meeting as we can be. As prescribed in our bylaws, the proposed changes to the bylaws were presented to the association one month ahead of the association business meeting. I encouraged the association to discuss these changes as much as possible. There has not been any discussion or questions posed to me regarding these changes. A couple of members did respond with encouragement, seeming to appreciate the work that went into this. As you all know, the changes were presented in a series of five action items. My hope is that this format will allow us to proceed through these changes in an organized and succinct flow of business that minimizes any confusion as to the nature of the changes or the motions that need to be made. Our meeting time is limited, and so in order for the conference schedule to stay on track, efficiency is important. If you hear any discussion or questions before the meeting, please try to answer the questions and/or bring them to me so that we don't have as much explaining during the meeting. Hopefully last year's vetting of this action with the association has laid the groundwork for this.

I have drafted a proxy form for designating proxies to the association meeting. The NeASFAA bylaws have always had this provision, but to my knowledge, NeASFAA has not had a formal proxy form. It may be a good thing to keep this on hand for future association meetings just so that we can better ensure that quorums can be established. I hope that we will have a quorum for this meeting even without the need for proxies, but some insurance never hurts.

This being my last board meeting as president, I want to thank you, the board, committee chairs and committee members for your service. I have learned a lot about organizations in general, about the people that make them up and about myself. I thank NeASFAA for the opportunity to serve in this capacity.

Respectfully Submitted  
Matt Johnson  
NeASFAA President

April 15, 2015

President-Elect Report – Kay Dinkelman

NeASFAA Board Meeting

Beth Sisk and I attended the NASFAA Leadership Conference (the Association Management Pathways track) in Washington, DC, March 1 – 3, 2015. We scheduled two 'hill visits'. We were able to meet with a senior staffer in Congressman Fortenberry's office, who is on the House Committee on Appropriations (no other Nebraska members of Congress are on an education or appropriations/budget committee).

We also met with a staffer in Senator Sasse's office. I selected Senator Sasse because he is new and I believed it would be good to introduce our organization and explain our availability as a resource for his office. This staffer was interested in what we had to say and had some great questions.

We discussed the need for the Federal Pell Grant and continued support. Neither staffer thought there was any chance for the continuation of the Perkins Loan program.

**Treasurer's Report  
NeASFAA Annual Business Meeting  
April 2015**

Submitted by Marty Habrock, Treasurer

**Item 1)** Review of (4) NeASFAA's CDs with current values:

4/13/2014				
<b>Account #</b>	<b>Bank</b>	<b>Length/Rate</b>	<b>Maturity Date</b>	<b>Value</b>
3-057-9044-4270	US Bank	12 months - 0.10%	1/3/2016	\$19,750.94
CD #576620	Union Bank	12 months - 0.20%	4/5/2016	\$14,350.22
CD #580134	Union Bank	12 month - 0.30%	7/10/2015	\$27,249.27
CD #586665	Union Bank	12 month - 0.30%	10/8/2015	\$29,646.43
				<b>\$90,996.86</b>

**Item 2)** Profit & Loss Statements and Balance Sheet

**Item 3)** The checking account balance is healthy and no reserves have been used to supplement the budget in the last 4 years.

- Total income for 2014-15 collected to date is \$21,680. As of 4/13/15, need to collect additional \$1,210 in Spring Conference registrations.
- Total expenses for 2014-15 paid to date is \$8,718.56. However, the majority of Spring Conference expenses are yet to be paid.
- Depending on actual Spring Conference expenses, may have to tap reserves for 2014-2015 in the amount of \$2,500 - \$3,000.

NeASFAA  
**Balance Sheet**

As of April 13, 2015

	<u>Apr 13, 15</u>
<b>ASSETS</b>	
Current Assets	
Checking/Savings	
Checking- 148985925327	36,543.16
Total Checking/Savings	36,543.16
Other Current Assets	
12 Month CD—Union Bk 4/5/13	14,350.22
12 Month CD-US Bank 1/3/2014	19,750.94
12 month CD - Union Bk 10/8/13	29,646.43
12 month CD -Union Bk 7/10/13	27,249.27
Total Other Current Assets	90,996.86
Total Current Assets	127,540.02
<b>TOTAL ASSETS</b>	<u><u>127,540.02</u></u>
<b>LIABILITIES &amp; EQUITY</b>	
Equity	
3000 - Opening Bal Equity	34,427.98
3900 - Retained Earnings	80,150.60
Net income	12,961.44
Total Equity	127,540.02
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<u><u>127,540.02</u></u>



## Profit &amp; Loss Budget vs. Actual

July 1, 2014 through April 13, 2015

On Basis

	Jul 1, '14 - Apr 13, 15	Budget	\$ Over Budget	% of Budget
<b>Income</b>				
Exhibitor Fees	1,000.00	2,900.00	-1,900.00	34.5%
Fall Workshop	1,020.00	2,400.00	-1,380.00	42.5%
Interest Income	0.00	1.00	-1.00	0.0%
Membership Income	12,025.00	11,550.00	475.00	104.1%
Reserve Debit*	0.00	642.00	-642.00	0.0%
Spring Conference	6,705.00	11,000.00	-4,295.00	61.0%
Support Staff Workshop	930.00	1,200.00	-270.00	77.5%
<b>Total Income</b>	<b>21,680.00</b>	<b>29,693.00</b>	<b>-8,013.00</b>	<b>73.0%</b>
<b>Expense</b>				
<b>Awards</b>				
Fun Awards	0.00	230.00	-230.00	0.0%
Prestige Awards	0.00	520.00	-520.00	0.0%
<b>Total Awards</b>	<b>0.00</b>	<b>750.00</b>	<b>-750.00</b>	<b>0.0%</b>
<b>Membership</b>				
Printing/Postage	0.00	50.00	-50.00	0.0%
Welcome Project	0.00	400.00	-400.00	0.0%
<b>Total Membership</b>	<b>0.00</b>	<b>450.00</b>	<b>-450.00</b>	<b>0.0%</b>
<b>PDC</b>				
<b>Fall Institute</b>				
Meals/Breaks	0.00	2,000.00	-2,000.00	0.0%
Miscellaneous	20.00			
Printing/Postage	0.00	300.00	-300.00	0.0%
Speaker Expense	108.37	1,000.00	-891.63	10.8%
Fall Institute - Other	1,375.00			
<b>Total Fall Institute</b>	<b>1,503.37</b>	<b>3,300.00</b>	<b>-1,796.63</b>	<b>45.6%</b>
Meeting Expense	99.18	250.00	-150.82	39.7%
<b>Spring Conference</b>				
Entertainment	267.45	1,000.00	-732.55	26.7%
Meals/Breaks	0.00	10,560.00	-10,560.00	0.0%
Printing/Postage	0.00	500.00	-500.00	0.0%
Speaker Expense	0.00	5,000.00	-5,000.00	0.0%
<b>Total Spring Conference</b>	<b>267.45</b>	<b>17,060.00</b>	<b>-16,792.55</b>	<b>1.6%</b>
<b>Support Staff Workshop</b>				
Attendee Materials	0.00	250.00	-250.00	0.0%
Meals/Breaks	476.50	1,000.00	-523.50	47.7%
Speaker Expense	0.00	300.00	-300.00	0.0%
<b>Total Support Staff Workshop</b>	<b>476.50</b>	<b>1,550.00</b>	<b>-1,073.50</b>	<b>30.7%</b>
<b>Total PDC</b>	<b>2,346.50</b>	<b>22,160.00</b>	<b>-19,813.50</b>	<b>10.6%</b>
<b>President/President Elect</b>				
<b>Board Meetings</b>				
Meals	251.70			
Board Meetings - Other	0.00	700.00	-700.00	0.0%
<b>Total Board Meetings</b>	<b>251.70</b>	<b>700.00</b>	<b>-448.30</b>	<b>36.0%</b>
Leadership Conference	3,219.37	3,000.00	219.37	107.3%
Miscellaneous	113.29	500.00	-386.71	22.7%
NASFAA Conference	1,664.16	1,750.00	-85.84	95.1%
<b>RNASFAA Conference</b>				
Registration	250.00			
RNASFAA Conference - Other	707.54	1,250.00	-542.46	56.6%
<b>Total RNASFAA Conference</b>	<b>957.54</b>	<b>1,250.00</b>	<b>-292.46</b>	<b>76.6%</b>
RNASFAA State Gift	75.00	75.00	0.00	100.0%
<b>Total President/President Elect</b>	<b>6,281.06</b>	<b>7,275.00</b>	<b>-993.94</b>	<b>86.3%</b>
<b>Secretary</b>				
Cards/Memorials/Flowers	0.00	50.00	-50.00	0.0%
<b>Total Secretary</b>	<b>0.00</b>	<b>50.00</b>	<b>-50.00</b>	<b>0.0%</b>
<b>Treasurer</b>				
Association Liability Policy	0.00	550.00	-550.00	0.0%
Banking Expenses	18.00	25.00	-7.00	72.0%
Biannual Non-profit Filing Fee	23.00	23.00	0.00	100.0%
Change of Agent Fee	0.00	10.00	-10.00	0.0%
Computer Expense	0.00	250.00	-250.00	0.0%
Computer Purchase*	0.00	600.00	-600.00	0.0%
Tax Preparation	50.00	50.00	0.00	100.0%
<b>Total Treasurer</b>	<b>91.00</b>	<b>1,508.00</b>	<b>-1,417.00</b>	<b>6.0%</b>
<b>Total Expense</b>	<b>8,718.56</b>	<b>32,193.00</b>	<b>-23,474.44</b>	<b>27.1%</b>
<b>Net Income</b>	<b>12,961.44</b>	<b>-2,500.00</b>	<b>15,461.44</b>	<b>-518.5%</b>

## Historian Report – J. Ritchie Morrow

April Board of Directors Meeting

Thanks to Kay Dinkelman and her staff at UNL 6 boxes of historic NeASFAA documents have been scanned and are now stored on a portable harddrive.

On a side note – at Matt's request I am serving as NeASFAA's representative on Nebraska's *Apply2College* campaign, an initiative in conjunction with the American Council of Education's American College Application Campaign. Eric Drumheller and Les Monroe of EducationQuest are serving as co-chairs of the committee which also includes a number of college admissions representatives and high school counselors. The idea of *Apply2College* is for high schools to set aside one day in the fall to get students to focus on applying to a college and/or to start investigating career options. In the fall of 2014 we had six high schools participate in a pilot project which was quite successful. For 2015 our goal is to sign up 75 high schools to schedule a day between October 19-30. High schools may contact college representatives and ask for assistance with the day. If this is something you might be interested in please let me know and as high schools sign up we can put you in touch with a high school in your area.

Report to the NeASFAA Board of Directors  
Professional Development Committee  
April 15, 2015

### **Summary of Training Activities for 2014-2015 Year**

*Fall Training on Enrollment Reporting/National Clearinghouse* -- conducted at Southeast Community College Jack J. Huck Continuing Education Center –

Attendees: 55

Speakers: Denise Ellis, Registrar Doane College  
Robert Haushalter, National Clearinghouse

*Support Professionals Workshop* – conducted at Doane College

Attendees: 28

Topics Included: SULA, Working and Playing Well with Others, Speed Dating Financial Aid Style and a panel discussion regarding the changing roles of support professionals in financial aid offices.

*Spring Conference – NeASFAA the Next Generation* Kearney Nebraska Holiday Day Inn

Attendees: 70 (anticipated)

Speakers: Justin Draeger, NASFAA CEO and Clay Anderson NASA Astronaut  
Philanthropy: Bright Futures Pre-School program in Kearney Public Schools

What did we learn this year and what would be some of our recommendations for the upcoming year:

1. We are excited to merge the awards and PDC committees into the Professional Development and Recognition Committee. Integrating celebrations throughout all of our training initiatives is an important part of building community among our members.
2. Some of the issues surrounding SULA remain to be relatively major concerns for our members. We probably left the fall training with more questions than answers. So going forward this would be a likely training topic that will continue to be our agendas.
3. Effective communication within our offices and with our students and campus colleagues also continues to be a thread of conversation and a topic that we tried to address in our training. This also may be something that continues to show up on agendas.
4. PDC needs to remain nimble to be able to act quickly to develop training if a hot topic arises. Given that we may be going into a year where reauthorization may happen, PDC leadership needs to be in tune and prepared to develop some training
5. PDC members and the NeASFAA Board need to be thinking about developing the right training at the right time in the right way. We discussed this year re-working the support professionals' workshop to be something different than it has been historically. This is because many of our offices are seeing real changes in the "lines" that define professional positions and those in support positions. It may be appropriate that our fall training is re-invented as a result.

I have enjoyed the PDC team this year and want to compliment this committee for their enthusiasm and efficiency and creativity.

They are:

Sara Nordquist Davis  
Beth Sisk  
Tom Ramaeker  
Carol Swenson  
Becca Dobry  
Jodi Vandenberg  
Gloria Hennig  
Angie Pinkerman  
Marron Keady  
Kent Wolfe  
Kay Dinkelman  
Peggy Tvrdy – Vice Chair

Respectfully Submitted,  
Mary Sommers

## Membership Committee Board Report

April 2015

The Membership Committee has two examples of what the Membership Renewal Application and the New Member Application form could look like. With these forms, the Treasurer will need to communicate the information to the new committee to ensure all changes and updates occur.

There are two templates that can be used to collect membership information. There is a New Member form and a Renewal Member form.

Respectively Submitted

Shareen Thewke

## **Finance and Audit Committee Report**

### **April 15, 2015 Meeting**

Budget requests forms were sent to the NeASFAA Committees and Board officers on February 3<sup>rd</sup>. The Finance and Audit committee met on March 3<sup>rd</sup> and prepared the 2015-16 budget proposal. Copies of the proposed budget have been made available.

Respectfully submitted,

Hylee Asche

Finance and Audit Committee Chair

## Corporate Development Report

April 2015

I have been working with Carol Renner, Associate Superintendent for Kearney Public Schools, in finalizing the philanthropy organization for the Spring Conference in Kearney. The Bright Futures Program is a preschool program within Kearney Public Schools that assists low income and disadvantaged students to attain a preschool education prior to enrolling in Kindergarten. Mrs. Renner was thrilled to have our support and excited to hear about the work that NeASFAA does to help students attain higher education.

Confirmed exhibitor/associate member attendance at NeASFAA spring conference to include 5 exhibitors.

I have nothing to report for the Associate Sector.

Stacy Seim

**NeASFAA Communications Committee Report  
April 15, 2015 NeASFAA Board Meeting**

**SOCS Mobile App**

SOCS now has a mobile app available that has been designed to make their clients' websites more mobile and user-friendly. The basic mobile app is free. Clients can have their app available in the Apple iOS store and the Google Play store for a start-up and maintenance fee. The app won't have full functionality unless it is available in the Apple iOS store and/or the Google Play store. Since the free app does not have full functionality, it is not recommended that NeASFAA take advantage of the mobile app at this time.

**Cloud Storage/File Sharing**

The NeASFAA Board of Directors and committee chairs are now using Dropbox Basic for individuals to store and share working documents. Each Board member creates his or her own Dropbox Basic account and shares documents as needed with other Board members.

**Archiving Documents**

Documents can be stored on the NeASFAA website by creating a private section. Board members will need a username and password to access. We can decide if we want a generic username and password for the Board members to use or if we will assign each Board member a username and password.

**NeASFAA Volunteer Form**

The NeASFAA Volunteer form is now available in an electronic format on [neasfaa.org](http://neasfaa.org). Members can complete and submit the form electronically through the website. The Word version of the form is still available on the website for those who prefer to print, complete, and mail the form.



## TEMPLATE FOR GATHERING NOG STUDENT SUCCESS STORY

### Student Section

**Student Name:**

**College/University:**

**City:**

**Hometown:**

**Age:**

**Career Aspirations:**

**Expected graduation month-year:**

**A Recent Picture:**

**Short testimony: to include how the NOG has helped to complete their education.**

**Please include some of the points below:**

- **Is student first generation**
- **What is the parent's income level**
- **What is the student's experience with other cultures**
- **Is there an inspirational story on why you went to college**

### FA Office Section

**Financial Aid Administrator Name:**

**Position:**

**College/University:**

**How did the NOG have impact to the student's COA and help to bridge the student's funding gap.**

**How is the NOG part of the entire FA Package?**

### Photograph

**Please include a current photo:**

- **Plain, light-colored background (e.g. cream, pale blue or white), with a clear difference between your face and the background.**
- **Appropriate brightness and contrast showing your skin tones naturally**
- **Taken with uniform lighting and no shadows**
- **Clear and sharply focused image (no other people visible).**

Dear:

Welcome to NeASFAA! This form gathers information about your institution and is the official document to collect membership dues.

The fees for colleges and universities are determined by the Full Time Equivalent (FTE) of the institution, while associate member fees have remained the same at \$200. The following table will show the tiered structure of dues:

<b>Full Time Equivalent (FTE)</b>	<b>Annual Membership Dues</b>
1 - 999	\$175
1,000 - 4,999	\$250
5,000 - 9,999	\$325
10,000 - 19,999	\$400
20,000+	\$475

**Return the enclosed invoice** along with your **payment** made payable to 'NeASFAA' to:

**Marty Habrock, NeASFAA Treasurer**  
**University of Nebraska-Omaha**  
**6001 Dodge Street**  
**Eppley Administration Building, Room 103**  
**Omaha, NE 68182**

The membership year is July 1 through June 30. Membership dues are due by **September 1, 2015.**

With your support NeASFAA will continue to be an effective professional organization.

Sincerely,

Renee Bessee

P:

Enclosure: Invoice

**NeASFAA MEMBERSHIP INVOICE**  
2015-16

**Institutional/Associate Member:**

**Address:**

**Phone:**

**Email:**

**School Code or Lender Code:**

**Does your office/institution have a Facebook Account:**

**Does your office/institution have a Twitter Account:**

**Does your office/institution participate in other social media:**

**What is your institution's computer software?**

**Membership status:** New

**Sector:**

Complete the information below for every member of your office you want included in the NeASFAA Website. Add as many lines as needed

Name	Email	Title	Years in FA
------	-------	-------	-------------

---

**\*FTE:** \_\_\_\_\_

**\*Amount Due:** \$ \_\_\_\_\_

---

\*The annual membership dues will be self reported based on the FTE of your institution. Please fill in the amount due based on the above 2015-16 fee structure.

---

Please make checks payable to **NeASFAA**. Return this invoice and your payment by **September 1, 2015** to:

**Marty Habrock, NeASFAA Treasurer**  
**University of Nebraska-Omaha**  
**6001 Dodge Street, Eppley Administration Building, Room 103**  
**Omaha, NE 68182**

The NeASFAA Federal Tax ID Number is: 47-0576634

---

Dear:

It is that time of year again time to show your support for NeASFAA by renewing your membership! There have not been any changes to the membership fee structure for the 2015-2016 year. The fees for colleges and universities are determined by the Full Time Equivalent (FTE) of the institution, while associate member fees have remained the same at \$200. The following table will show the tiered structure of dues:

Full Time Equivalent (FTE)	Annual Membership Dues
1 - 999	\$175
1,000 - 4,999	\$250
5,000 - 9,999	\$325
10,000 - 19,999	\$400
20,000+	\$475

To continue your NeASFAA membership for the 2015-16 year, please **return the enclosed invoice** along with your **payment** made payable to 'NeASFAA' to:

**Marty Habrock, NeASFAA Treasurer**  
**University of Nebraska-Omaha**  
**6001 Dodge Street**  
**Eppley Administration Building, Room 103**  
**Omaha, NE 68182**

The membership year is July 1 through June 30. Membership dues are due by **September 1, 2015**. Membership renewals received after September 1, 2015 will be assessed a late fee of \$50.

I would like to thank you in advance for your continued membership! With your support NeASFAA will continue to be an effective professional organization.

If you are unable to renew your membership for any reason, please e-mail a brief description of the reason(s) to me at [rbesse@unk.edu](mailto:rbesse@unk.edu) in order for your concerns to be anonymously addressed with the NeASFAA Board members.

Sincerely,

Renee Besse  
Enclosure: Invoice

## **BOD Action Item 2 – Training Dates**

Justification:

Calendar needs updated to keep everyone on the same page. P&P update

New Language:

Update the Membership Communications committee with dates, times and locations of training events as soon as these are established to facilitate the continued updating of the online calendar.

## **Action Item #3 – Awards Ordering**

Justification:

Need to establish the responsibility to order the awards in P&P.

New Language:

Once annual award recipients are established, PDRC is responsible to order the awards that will be presented during conferences or other events, including the Past-Presidents plaque and any other service, retirement and/or fun recognitions deemed appropriate for the awards ceremonies.

# NeASFAA Budget Proposal for 2015-16

## INCOME

Membership Income	11750
Reserve	2625
Support (exhibit at spring conf)	1500
Spring Conference	11000
Support Staff Workshop	900
Fall Workshop	1650
<b>TOTAL INCOME</b>	<b><u>\$ 29,425</u></b>

Projected Membership		
16	\$ 175	\$ 2,800
14	\$ 250	\$ 3,500
3	\$ 325	\$ 975
2	\$ 400	\$ 800
1	\$ 475	\$ 475
16	\$ 200	\$ 3,200
		<u>\$ 11,750</u>

Spring Conference		
100	\$ 110	\$ 11,000

  

Support Staff Workshop		
30	\$ 30	\$ 900

  

Fall Workshop		
55	\$ 30	\$ 1,650

## EXPENSES

### Awards

Fun Awards	230
Prestige Awards	520
	<u>\$ 750</u>

### Membership

Welcome Project	200
Printing/Postage	25
	<u>\$ 225</u>

### PDC

<b>Meeting Expense</b>	<u>250</u>
	<b>\$ 250</b>

#### Spring Conference

Entertainment	1000
Meals/Breaks	12000
Printing/Postage	500
Speaker Expense	4000
	<u>\$ 17,500</u>

#### Support Staff Workshop

Meals/Breaks	550
Speaker Expense	300
Attendee Materials	150
	<u>\$ 1,000</u>

#### Fall Training

Meals/Breaks	1000
Printing/Postage	100
Speaker Expense	1000
	<u>\$ 2,100</u>

**TOTAL PDC** **\$ 20,850**

### President/President Elect

Board Meetings	500
Transitional Board Meeting	200
Leadership Conference	3150
NASFAA Conference	1750
RNASFAA Conference	1250
RNASFAA State Gift (Past President)	75
	<u>\$ 6,925</u>

### Secretary

Cards/Memorials/Flowers	50
	<u>\$ 50</u>

### Treasurer

Assoc Liability Policy	550
Banking Expense	25
Tax Preparation	50
	<u>\$ 625</u>

**TOTAL EXPENSES** **\$ 29,425**

1. Projected Membership income is based on paid memberships from 2014-15.

2. Projected Fall Workshop and Support Staff Workshop income is based on registrations from 2014-15.

3. Projected Support (exhibit at spring conference) is based on paid exhibitors from 2013-14.

4. Projected Spring Conference income is based on Spring registrations and adjusted based on future location.

5. Propose to raise Fall Workshop registration fee to match Support Staff Workshop fee and cover cost of event.

## NeASF<sup>AA</sup> New Membership Questionnaire

*Welcome to NeASF<sup>AA</sup>! We are excited to have you as a new member. NeASF<sup>AA</sup> has a lot to offer you whether you are a new to the financial aid profession or a seasoned veteran. To help NeASF<sup>AA</sup> to get to know you better and know what your needs are or what your interests are please complete the questions below.*

1. Name and current position: \_\_\_\_\_

2. Current job responsibilities:

---

---

---

3. How long have you been in the financial aid industry?

---

4. How did you hear about NeASF<sup>AA</sup> and why did you decide to join?

---

---

---

5. What can NeASF<sup>AA</sup> do for you? What do you hope to get out of the organization?

---

---

6. Please share your area of expertise in financial aid or a special talent that you have:

---

---

7. What do you like best about financial aid? \_\_\_\_\_

---

---

---