



SAAHP

SAAHP Policy Manual

Last edited May 2025



SAAHP

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Mission

The Southeastern Association of Advisors for the Health Professions (SAAHP) empowers and supports pre-health professions advisors across the Southeast through collaboration, professional development, and advocacy, ensuring students are well-prepared for successful entry into health professions.

Vision

To be the preeminent regional organization advancing excellence in pre-health professions advising by fostering a connected, informed, and inspired community of advisors across the Southeastern United States.

Financial Management Policies

Basic Financial Management

Dues

Gifts and Sponsorship Acceptance Policy

Travel Reimbursement Policy

Travel Grant Policy

Operating Reserve Policy

Annual Budget Approval Policy

Financial Management Policy

In order for financial transparency and accountability within SAAHP, the individuals listed below will be given access to:

- The SAAHP President and Treasurer will have full access to the SAAHP savings and checking accounts at Fifth-Third Bank, will be listed as signers on SAAHP checks, and will each have a debit card that can be used for necessary purchases for the organization.
- The SAAHP Vice-President and Assistant Treasurer will be given “viewer” status for the SAAHP savings and checking accounts at Fifth-Third bank and will have the ability to look at the accounts and any transactions within each account.

Budget

The Treasurer will monitor and oversee the SAAHP budget. The fiscal year dates and annual budget approval process should be followed as outlined in the bylaws.

Financial Reporting Requirements

- The Treasurer will prepare a concise financial report for each regular Board meeting. The report will detail the organization's major income and expenses incurred since the previous regular meeting.
- The Treasurer will prepare a financial report for the yearly regional or national meeting, which summarizes the major income and expenses for the entire fiscal year. This report will be presented to the entire SAAHP membership present at the regional or national meeting.
- Audit requirements will be followed as outlined in the SAAHP bylaws.

SAAHP Membership Dues Policy

SAAHP requires that select membership types pay annual membership dues to be considered a member in good standing. The SAAHP Board determines the yearly membership fee for each affiliation type, to be paid as a yearly fee by October 31 of the current membership year. Members with outstanding dues will have their membership status suspended and lose membership benefits until payment is fully rectified.

The Board of Directors will review dues annually and may adjust membership dues at their discretion. The SAAHP Board shall review and decide any questions or disputes regarding the SAAHP Membership Dues Policy within 30 business days.

Annual Dues

- Advisor Member: \$50
- Community College Member: \$25
- Emeritus Member: \$0
- Affiliate Advisor Member: \$25
- Patron Member: \$50
- Independent Advisor Member: \$200
- Association Member: \$100 for the first two representatives, \$25 for all additional representatives above 2.

SAAHP Gift and Sponsorship Acceptance Policy

Purpose

The purpose of this policy is to establish clear guidelines for the acceptance, acknowledgment, and management of gifts and sponsorships to ensure alignment with the mission, values, and non-profit status of the Southeastern Association of Advisors for the Health Professions, Inc. (SAAHP).

Scope

This policy applies to all gifts, sponsorships, and donations offered to or solicited by SAAHP, including but not limited to those supporting the SAAHP Regional Conference, as well as other programs, initiatives, or operational needs.

Acceptance Criteria

1. Mission Alignment

All gifts and sponsorships must support and advance the mission of SAAHP to promote excellence in health professions advising and education. Contributions that conflict with this mission or the organization's values will not be accepted.

2. Legal and Ethical Compliance

Gifts and sponsorships must comply with all applicable non-profit rules, laws, and governing requirements. Contributions from sources engaged in illegal, unethical, or discriminatory practices will be declined.

3. Non-Exchange for Member Information and Access

Member contact information will not be shared, sold, or exchanged in return for sponsorships or gifts unless specifically approved by the SAAHP Board of Directors and in accordance with applicable privacy and governance rules. Solicitation of events, programs, initiatives, and offers to the membership, including emailed or mailed contact to the members, may not be incorporated into a sponsorship benefit without specific approval by the SAAHP Board of Directors.

4. Unrestricted vs. Restricted Contributions

- **Unrestricted Gifts:** Contributions without specific designations are preferred to allow for flexibility in addressing organizational priorities.
- **Restricted Contributions:** Contributions designated for specific purposes will be accepted only if the restrictions align with SAAHP's mission, goals, and operational capacity.

5. Transparency in Sponsorship Benefits

Sponsorship arrangements must be documented to ensure clarity regarding deliverables, such as branding, recognition, or participation opportunities, and must not imply endorsement of a sponsor's products or services.

Review and Approval Process

1. Initial Review

All proposed gifts and sponsorships will be evaluated by the designated committee, as assigned by the President, to ensure compliance with this policy.

2. Approval Authority

Regional Conference sponsorships will be reviewed and approved by the Vice President and Conference Committee Co-Chair of SAAHP, when authorized by the SAAHP President.

Sponsorships or gifts outside of the Regional Conference will require review and approval by the SAAHP Executive Committee.

3. Right to Decline

SAAHP reserves the right to decline any gift or sponsorship that:

- Conflicts with its mission or values.
- Violates non-profit regulations or creates a potential conflict of interest.
- Places undue operational or financial burden on the organization.

Acknowledgment and Reporting

1. Acknowledgment

All contributions will be acknowledged in a timely manner, including written confirmation of the gift or sponsorship and any agreed-upon recognition opportunities.

2. Non-Profit Compliance

SAAHP will ensure compliance with all non-profit rules and reporting requirements, including issuing appropriate documentation for tax purposes.

Sponsorship Agreements

For sponsorships, a formal agreement will outline the terms of the sponsorship, including the specific benefits offered to the sponsor (e.g., recognition at events, logo placement).

A sample sponsor agreement can be found in the Appendix of this document.

SAAHP Travel Reimbursement & Benefit Policy

Approved: December 20, 2023

Purpose

It is the policy of the Southeastern Association of Advisors for the Health Professions (“SAAHP”) to provide reimbursement for volunteer board members for pre-approved travel-related expenses, including transportation, hotels, and food. These expenses must be reasonable and necessary, as well as business-related, and must be pre-approved in writing by the Executive Committee.

Policy Details

Volunteer board members should make every effort to reduce travel costs. Volunteer board members should travel at the lowest available airfare and hotel rates to accommodate the purpose of the business trip. Reimbursement requests deemed excessive or not meeting the policies outlined herein may be denied at the discretion of the Executive Committee.

Procedures

1. SAAHP will only reimburse for pre-approved travel-related expenses when the volunteer board member provides documentation of the expense with receipts from purchases or other verifiable documentation.
2. Receipts must be itemized, or an affidavit must be submitted member and accompany the available documentation outlining and attesting to the purchase details, if itemized receipts are unavailable.
3. Travel Reimbursement Request forms must be submitted to the Treasurer within 60 days of travel. All receipts should be scanned/attached and submitted with the form.

Customary Reimbursements

- **National Conference:**
 - Registration and airfare or mileage (whichever is cheaper) reimbursements are customary for the President and Vice President, if not reimbursed by NAAHP for their Board service. Meals, hotels, ridesharing fees, parking, and other expenses are generally not reimbursed for the SAAHP President and Vice President.

- It is not customary for SAAHP to reimburse meals, registration, hotels or any other expenses for additional SAAHP Board members attending the National Conference.
- **SAAHP Regional Conference:**
 - Registration waivers are generally provided for all SAAHP Board and regional planning committee members. This benefit is non-transferable. Conference planning committee member reimbursements may not exceed fifteen people, not including the co-chairs.
 - Applicable travel expenses, meals, and hotel expenses will be provided for the duration of the conference for the SAAHP President, SAAHP Vice President, SAAHP Treasurer, and up to two SAAHP planning committee chairs.
 - The two regional conference committee chairs, President, Vice President, and Treasurer will each receive one (1) complimentary hotel room for the duration of the conference and board meeting, and up to one night prior to the start of these events. If available, the complimentary room(s) will be awarded through contractual benefits (see section below). If no contractual benefits exist, SAAHP will cover the full or remaining amount of the room costs for these individuals.

Benefits:

Many contracts with hotels and establishments provide benefits to the organization. Below are the guidelines for awarding these benefits to members and guests of the SAAHP organization:

- Priority for complimentary rooms is as follows:
 1. Conference Chair
 2. Conference Co-chair
 3. President
 4. Vice President
 5. Treasurer
 6. Immediate Past President
 7. Keynote Speakers
 8. VIP Guests- as determined by the executive committee
 9. Secretary
 10. Assistant Treasurer

11. Remaining Board members, based in order of time served on the SAAHP Board.

- Room Upgrades: Any complimentary hotel upgrades and amenities will be assigned in the following order if attending and not already accounted for:
 1. Conference Chair (best available upgrade)
 2. Conference Co-Chair
 3. President
 4. Immediate Past President
 5. Vice President
 6. Treasurer
 7. Secretary
 8. Assistant Treasurer
 9. Keynote Speakers
 10. VIP Guests- as determined by the executive committee
 11. Remaining Board members based in order of time served on the SAAHP Board
 - Additional Benefits:
 - Hotel or Conference Center Amenities: any additional amenities should be awarded in the same order as room upgrades.
 - Hotel Points: Awarded to the SAAHP President serving at the time of the conference.
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SAAHP Travel Grant Policy

Approved: October 2023

Purpose

The purpose of the SAAHP Travel Grant is to provide financial assistance to members, enabling them to attend regional and national conferences hosted by SAAHP and the National Association of Advisors for the Health Professions (NAAHP). These conferences offer invaluable opportunities for personal and professional growth, contributing to the organization's mission.

Eligibility

To receive a SAAHP Travel Grant:

1. Applicants must be active members of SAAHP.
2. Applicants must demonstrate a need for financial assistance.

Application Process

- Applicants must submit a Travel Grant Application with required documentation by the announced deadline. The deadline for applications will be announced prior to each conference.
- The Regional Conference Grant Committee, consisting of the SAAHP Treasurer, SAAHP Assistant Treasurer, and any additional members determined by the SAAHP President, will review applications for regional conferences. The NAAHP Board determines grants for national conferences.

Eligible and Ineligible Expenses

Travel grant funds may only be used to cover conference and travel-related expenses for the specific conference awarded and may only cover the designated awardee. Expenses for guests will not be reimbursed. Expenses above and beyond a travel grant allocation will not be reimbursed. The SAAHP Executive Committee reserve the right to provide additional guidelines for any eligible or ineligible expenses, regardless of the guidelines below.

Unless otherwise approved or stated by the SAAHP Executive Committee, eligible conference-related expenses are limited to:

- **Transportation:** Expenses related to transportation to and from the conference, such as airfare, train tickets, or mileage reimbursement for personal vehicles, are eligible. Mileage reimbursement greater than a reasonable, economy ticket via airline or train will not be accepted.

- **Baggage Fee:** One traditional carry-on or checked bag, not both, can be accommodated per person. Oversized baggage fees and any additional baggage fees are not accepted.
- **Lodging:** The grant can be used to cover the cost of base-fare hotel accommodations, at the designated conference hotel and for the conference designated rate, if applicable, during the published conference dates. Room nights proceeding or preceding the stated conference dates will not be covered. Room costs above the stated conference rate, if applicable, will not be covered.
- **Ground Transportation:** Reasonable costs for local transportation to and from the conference location, such as taxi or shuttle services, are eligible.
- **Parking:** Parking fees at hotels, airports, and train stations in relation to the designated conference attendance are acceptable.
- **Conference Registration:** Typically, the conference registration fee is waived for all travel grant recipients. If the conference registration fee is not waived, the travel grant may be used to cover this expense.

Ineligible expenses include, but are not limited to, the following:

- Meals
- Presentation fees
- Travel insurance
- Visa/passport fees
- Upgrades to hotel rooms or modes of transportation
- Childcare fees
- Alcohol
- Materials or supplies
- Other miscellaneous costs (Wi-Fi fees, materials or supplies, pet boarding fees)
- Expenses above the travel grant allocation, even if eligible

Reimbursement

Grant recipients must provide proof of conference attendance and itemized receipts for all expenses for reimbursement, following the guidelines outlined in the policy. All receipts must be received by the SAAHP Treasurer or their stated designee by the published deadline. Receipts received after the stated deadline or those deemed ineligible will not be reimbursed.

Review and Revision

This policy will be reviewed annually to ensure its effectiveness and relevance. The executive committee of SAAHP may adjust this policy at any time.

SAAHP Operating Reserve Policy

Approved: April 17, 2024

Purpose

The purpose of this policy is to define and set goals for the reserve funds for SAAHP. The Operating Reserve, henceforth referred to as “Reserves”, ensure the organization can sustain operations during income loss or unforeseen expenses and support nonrecurring expenses that contribute to organizational longevity. The reserve is not meant to be a permanent source of income for the organization and will only be used when necessary. Additionally, when reserve funds are used, they should be replenished as soon as possible.

Funding

- Reserves will reach completion at \$150,000 or the amount needed to sustain two years of operations without income, whichever is larger.
- In order to reach the above financial goal, excess revenue remaining at the end of each fiscal year (not to exceed \$25,000) will be added to the reserve account until the reserve goal is met.

Monitoring and Review

- The Finance Committee and Treasurer will monitor the reserves and present an annual report during the budget review. The allocation recommendation will be presented to the Board for consideration no later than 3 months after the budget review has taken place.

Usage

- Use of reserves should only be authorized in cases of extreme necessity and requires a detailed request and replenishment plan, subject to Board approval.
- Releasing any amount of the Reserve funds will involve the following procedure:
 - The President or Vice-President will submit a request to use the Reserves to the SAAHP Board. The request will include a detailed use of the funds along with additional plans for replenishing the funds after using them.
 - With majority Board approval, the Treasurer will release the funds and submit the necessary payment(s) previously approved by the Board.

SAAHP Annual Budget Approval Policy

Approved: April 17, 2024

Overview

The SAAHP Board of Directors is responsible for creating an annual budget in alignment with the SAAHP Bylaws.

Policy

- The Executive Committee will meet at least once per fiscal year and outline projected income and expenses for the upcoming fiscal year that considers the previous year's income and expenses alongside future projected income and expenses.
- The Treasurer will present a proposed budget, approved by the Executive Committee, to the Board at the April meeting, where it will be reviewed and, if needed, revised. The Board has authority to approve the fiscal year budget and must do so prior to the May/June business meeting held during the national or regional meeting.
- The final, approved budget will be presented to the membership at the May/June National or Regional meeting.

Budget Components

The proposed budget will include:

1. Financial goals (outlined in 1-year, 5-year, and 10-year increments).
2. Projected expenses and revenue, including but not limited to conference income, membership dues, tax preparation fees, Board insurance, etc.
3. Uncertainty funds for unanticipated expenditures.
4. Projected income from any new/proposed activities.
5. Audit report information
6. Reserve account status.

Decision-Making

Decisions will be made by a majority vote of Board members present and eligible to vote.

SAAHP Code of Conduct Policy

This Code of Conduct outlines basic principles for respectful and professional behavior at all internal or external SAAHP events, including but not limited to, SAAHP conferences, meetings, workshops, and presentations, both online and in-person. This policy applies to all members, affiliated organizations, and entities that do business with SAAHP. We require SAAHP members and affiliates to adhere to the following policies and guidelines to ensure a positive and productive environment for everyone involved.

SAAHP encourages:

- **Compliance:** Adhering to the rules and regulations of the conference/meeting and the host location.
- **Respect:** Treating others with dignity and consideration.
- **Inclusion:** Creating an inclusive and welcoming environment for all participants.
- **Professionalism:** Maintaining a professional and ethical demeanor.

SAAHP acknowledges that appropriate professional conduct includes:

Being considerate and respectful to each other. We require that all members, guests, vendors, and individuals doing business with SAAHP treat everyone with kindness, empathy, dignity, and refrain from distracting behaviors that take attention away from our organization's mission and values. This includes refraining from any form of unwanted contact, harassment, discrimination, or bullying based on race, gender, sexual orientation, religion, disability, age, or any other protected characteristic.

Communicating openly and thoughtfully and encourage others to do the same. Share your ideas and perspectives clearly and constructively.

Being complicit with all rules, policies, and procedures of facilities or organizations, including adhering to local laws and regulations. Adhere to the rules and regulations of the conference/meeting venues and recommendations from officials and event organizers related to public health and safety.

Consequences and Reporting. Behavior that is disruptive, disrespectful, abusive, discriminatory, or harassing in nature is not allowed. Please see Appendix B for additional information on what is deemed unacceptable behavior. SAAHP members are encouraged to report violations to the SAAHP Board. Violations of the Code of Conduct are subject to review by the SAAHP Board and may result in disciplinary action, up to removal from the organization.

Conflict of Interest Policy

Purpose

The Southeastern Association of Advisors for the Health Professions (SAAHP) is committed to upholding the highest standards of integrity, transparency, and professional ethics. This Conflict-of-Interest Policy ensures that all Board Members act in the best interest of SAAHP, avoiding any conflicts that may compromise their judgment, responsibilities, or decision-making.

Guiding Principles

SAAHP Board Members serve three key professional priorities:

1. Service to students and alumni
2. Service to their institutions
3. Service to SAAHP and the Board

With these priorities in mind, Board Members are expected to:

- Exercise reasonable care in decision-making (Duty of Care)
- Act in the best interest of SAAHP over personal or institutional interests (Duty of Loyalty)
- Remain faithful to SAAHP's mission and governance policies (Duty of Obedience)
- Use best judgment and avoid conflicts of professional priorities (Duty of Ethics)

Responsibilities of SAAHP Board Members

To maintain transparency and accountability, Board Members must:

- Disclose any actual, potential, or perceived conflicts of interest in a timely manner.
- Recuse themselves from discussions and decisions where conflicts exist.
- Maintain confidentiality regarding Board discussions, documents, and privileged information.
- Avoid using their position for personal, financial, or professional gain.
- Report any ethical concerns or conflicts to the SAAHP President or Board leadership.

Code of Ethics

SAAHP Board Members commit to:

- Prioritizing SAAHP's mission and best interests over personal or institutional interests.

- Using sound judgment in instances of competing priorities and recusing themselves when conflicts cannot be avoided.
- Referring complex ethical concerns to the SAAHP President or Board leadership for further discussion.
- Upholding professionalism, competence, fairness, and transparency in all actions.
- Respecting Board structure and policies, ensuring informed decision-making.
- Communicating openly while maintaining confidentiality regarding sensitive matters.
- Demonstrating personal integrity, honesty, and ethical leadership.

Prohibited Conduct

To maintain the integrity of SAAHP, Board Members shall NOT:

- Misrepresent SAAHP in any negotiations, agreements, or public communications.
- Disclose proprietary or privileged information without proper approval.
- Board members may not accept individual gifts related to their service on the SAAHP Board, except for modest tokens or items received as part of official Board activities not exceeding \$100 (e.g., service awards, special recognition for projects, etc.). For the purposes of this policy, Board benefits such as those outlined in our travel reimbursement policy are not considered gifts. Gifts may be accepted on behalf of the organization or by the Board collectively, or with approval by the Executive Committee, but not for the personal benefit of individual members. Any questions regarding the appropriateness of a gift should be directed to the SAAHP Treasurer or President.
- Engage in unethical business practices or use SAAHP resources for personal benefit.
- Fail to fulfill Board responsibilities or neglect assigned duties.

Enforcement & Compliance

- Any Board Member found to be in violation of this policy may be subject to disciplinary action, including removal from the Board.
- All Board Members must sign a Conflict of Interest Disclosure Form annually and update it as needed.
- Concerns or potential violations should be reported to the SAAHP President or the Board for review.

Policy Review & Updates

This policy will be reviewed annually and updated as necessary to ensure alignment with best practices, legal requirements, and organizational needs.

Records Management & Document Retention Policy

Purpose

The purpose of this policy is to establish consistent practices for the retention, management, and disposal of organizational records. This policy ensures compliance with applicable federal, state, and local regulations, eliminates accidental destruction of necessary records, and optimizes record-keeping efficiency.

This policy applies to all employees, board members, volunteers, committee members, and contractors who create, receive, or maintain records on behalf of the organization.

Scope & Compliance

The organization is committed to retaining records as required by law and eliminating records no longer needed to ensure efficiency. All employees and stakeholders are expected to:

- Retain and store records for the minimum required period per this policy.
- Follow proper document disposal procedures once records exceed the required retention period.
- Ensure records are not destroyed if they are relevant to legal proceedings, audits, or government investigations.
- Adhere to data security and confidentiality protocols when handling sensitive records.

Document Retention Schedule

Type of Document	Minimum Retention Period
Accounts payable ledgers and schedules	7 years
Audit reports	Permanently
Bank reconciliations	2 years
Bank statements	3 years
Checks (for important payments and purchases)	Permanently
Contracts, mortgages, notes, and leases (expired)	7 years
Contracts (still in effect)	Contract period

Type of Document	Minimum Retention Period
Correspondence (legal and important matters)	Permanently
Correspondence (with customers and vendors)	2 years
Expense analyses/expense distribution schedules	7 years
Year-end financial statements	Permanently
Insurance records (claims, policies, reports)	Permanently
Internal audit reports	3 years
Inventory records for products/materials	3 years
Invoices (to customers, from vendors)	7 years
Minute books, bylaws, and charter	Permanently
Tax returns and worksheets	Permanently
Withholding tax statements	7 years

Document Destruction Guidelines

Records that have exceeded the retention period and are not subject to an ongoing investigation or legal hold must be properly destroyed to protect sensitive information. The organization follows these guidelines:

a. Paper Documents

- Shred any documents containing personal, financial, or proprietary information.
- Recycle non-sensitive documents when possible.

b. Electronic Records

- Delete outdated electronic files from individual computers, servers, and databases after one year.
- Remove obsolete records from backup storage systems per retention requirements.

c. Litigation Hold

- No documents may be destroyed if they are subject to an audit, investigation, or legal proceedings.
- Employees must consult legal counsel before deleting records that could be relevant to ongoing or anticipated litigation.

Responsibilities & Enforcement

The Treasurer (or relevant administrator) is responsible for overseeing compliance with this policy for all documents related to financial practices. The Secretary (or relevant administrator) is responsible for overseeing compliance with all correspondence, bylaws, minutes, and related documents. Board members must report any suspected policy violations to the President of the Board.

Policy Review & Updates

This policy will be reviewed annually and updated as needed to remain compliant with legal and regulatory changes.

Policy Manual - Governance & Review Policy

Purpose

The purpose of this policy is to establish a clear, structured process for the development, approval, review, and amendment of the organization's Policy Manual. A well-maintained Policy Manual ensures that governance, operational, and board process policies remain aligned with the organization's mission, values, and strategic direction.

Scope & Authority

The Board of Directors has the exclusive authority to approve, amend, or repeal policies included in the Policy Manual.

Policies in the manual include:

- Vision, mission, and values statements
- Board governance and operational policies
- Financial and personnel policies
- Strategic and compliance-related policies

Policies must be reviewed regularly to ensure alignment with organizational needs, best practices, and legal requirements.

Policy Review & Amendment Process

- Regular Review: Policies should be reviewed at least annually to determine if updates are needed. The Board may initiate reviews more frequently as necessary.
- Amendments & New Policies: Any proposed changes or new policies must be presented to the Board for discussion and approval.

Board Approval Process

All revisions require a formal motion and vote pursuant to the bylaws, with the full revised policy included in the Board minutes. Substantial changes or new policies should be attached as an appendix to the official Board meeting minutes.

If a policy is reviewed with no changes, no motion is required, but the minutes should reflect that the policy was reviewed and reaffirmed.

Documentation & Accessibility

All approved policy changes must be recorded in the official meeting minutes.

The most current version of the Policy Manual must be maintained and accessible to Board members and key organizational leaders.

Draft policies under review may be included in the manual but must be clearly marked as pending approval.

Compliance & Implementation

The President is responsible for implementing policies as approved by the Board. They ensure that all policies are reviewed on schedule and properly documented.

Any conflicts or inconsistencies in policy application should be promptly addressed through Board review and clarification.

Policy Review & Updates

This policy itself will be reviewed annually and updated as necessary to align with best governance practices and organizational needs.

SAAHP Communication Policy

Purpose

This policy establishes guidelines for internal and external communications to ensure that all messaging aligns with the mission, values, and strategic goals of the Southeastern Association of Advisors for the Health Professions, Inc. (SAAHP). The policy also outlines roles, responsibilities, and expectations regarding public statements, social media, and branding.

Scope

This policy applies to all SAAHP members, staff, board members, and volunteers engaging in internal and external communications, including emails, press releases, social media posts, branding materials, and public speaking engagements.

Key Principles

1. Consistency and Clarity

All communications should reflect the organization's mission, goals, and tone.

2. Professionalism

Messages should be accurate, respectful, and free of personal opinions that could be misconstrued as representing SAAHP.

3. Approval and Oversight

Communication on behalf of the organization must follow the chain of command outlined below.

Roles and Responsibilities

1. President as Primary Spokesperson

- Only the President (or a designated representative approved by the Board of Directors) may speak on behalf of SAAHP.
- This includes interviews, public statements, media engagements, and responses to external inquiries.

2. Board Members and Volunteers

- Board members and volunteers must refrain from making statements that could be perceived as representing SAAHP unless authorized.
- Internal updates or communications with members should be vetted through the appropriate committee or leadership structure.

3. Executive Committee Oversight

- All official communication strategies, including branding and social media campaigns, must be approved by the Executive Committee or a designated subcommittee.

Internal Communications

1. Clear Channels

- Use designated channels (e.g., email, shared drives, project management tools) for internal communication to ensure transparency and avoid miscommunication.

2. Promotion

- Solicitation of events, programs, initiatives, and offers to the membership that are not directly facilitated by SAAHP Committees or SAAHP events are prohibited unless specifically approved by the SAAHP Board of Directors.

3. Confidentiality

- Members must not share sensitive information outside of approved internal circles.

4. Professional Tone

- Internal communications should reflect the same professionalism and respect as external messaging.

External Communications

1. Approval Process

- All external messages, including press releases, newsletters, and public announcements, must be approved by the President or a designated representative.

2. Promotion

- Solicitation of events, programs, initiatives, and offers to the membership that are not directly facilitated by SAAHP Committees or SAAHP events are prohibited unless specifically approved by the SAAHP Board of Directors.

3. Social Media

- Posts on SAAHP's official social media accounts must align with the organization's branding and communication guidelines.

- Only authorized individuals may manage or post from official accounts.
- Personal social media accounts of members and volunteers should not imply endorsement or representation of SAAHP unless explicitly authorized.

4. Media Relations

- Media inquiries must be directed to the President or designated representative.
- No individual may independently engage with the media on behalf of SAAHP without prior approval.

Branding Guidelines

1. Consistency

- All branding materials (e.g., logos, fonts, color schemes) must adhere to the official SAAHP brand guidelines.
- Changes or deviations require approval from the Board of Directors or the designated marketing team.

2. Use of Logo and Name

- SAAHP's logo and name may not be used without written permission for any materials, events, or communications not explicitly associated with the organization.

3. External Partnerships

- Any co-branded materials or communications with external partners must be approved by the President and conform to SAAHP's branding and communication standards.

Social Media Policy

1. Authorized Accounts

- SAAHP's official social media accounts will be managed by authorized individuals approved by the Executive Committee.

2. Content Guidelines

- Posts should be professional, aligned with SAAHP's mission, and free of personal opinions.

- Responses to comments or messages should be handled promptly and diplomatically, with complex inquiries referred to the President or designated representative.

3. Personal Social Media Use

- Members are encouraged to clarify that opinions shared on personal accounts are their own and not reflective of SAAHP.
- Avoid sharing confidential or sensitive information related to the organization on personal platforms.

Enforcement

1. Compliance

- Any member found violating this policy may face corrective action, up to and including removal from their role or membership.

2. Reporting Issues

- Concerns about communications or social media misuse should be reported to the President or Executive Committee for review.

APPENDIX

Appendix A

SAAHP Sponsorship Agreement

The following Sponsorship Agreement, dated as of _____ between
**The Southeastern Association of Advisors for the Health Professions (SAAHP), Inc. [Primary Contact:
Lauren Albaum, Vice President & Conference Planner] and**

(Institution, Organization, Association, Commercial Entity)

Contact: _____

Contact Title: _____

Contact Number: _____

Address Line 1: _____

Address Line 2: _____

City: _____ **State:** _____ **Zip:** _____

Email: _____

Terms and Conditions

A. The SAAHP hosts a biennial national meeting to facilitate professional development and networking between representatives at undergraduate institutions, graduate institutions, health professions associations, and companies who offer resources for those advising students applying to health professions programs. Sponsorship opportunities are made available, in support of the association, to fund conference amenities activities. Sponsors are provided with special visibility offers, as outlined in the list of sponsorship opportunities, as our thanks for their support.

B. The sponsor agrees to the sponsorship listed below:

Sponsorship Opportunity: _____

Estimate Number of Items Needed: _____

Cost of Sponsorship: _____

C. This agreement sets framework and understandings regarding the arrangement, payments, disclosures, legal compliance, use of trademarks and terms of the sponsorship. The agreement relays specifics regarding SAAHP and the sponsor's trademarks which may be used in connection with the sponsorship. As used in this agreement, the term "Sponsorship" means the relationship contemplated by this Agreement.

SAAHP, Inc. and the listed sponsor agree as follows:

1. SPONSORSHIP

1.1 Sponsorship Payment

The sponsor will be invoiced by the SAAHP Treasurer and payment for the cost of the opportunity will be made to SAAHP directly. SAAHP will be responsible for placing the order for amenity items and coordinating with the sponsor and the vendor for the amenity. The sponsor will be responsible for providing their approved graphics, logo and any additional information needed for ordering the sponsor amenities or coordinating the sponsorship opportunity.

1.2 Sponsor Recognition

The listed institution, organization, or company will be an official sponsor of the SAAHP Regional Meeting for the amenity or support as specified in this agreement. SAAHP will acknowledge the sponsor in following its customary recognition practices.

1.3 Publicity by Sponsor

The listed sponsor may identify itself as a sponsor for the amenity or support as noted above. Except as required by law, Sponsor will not issue any press release or other public statements (including on its website) relating to its Sponsorship without obtaining SAAHP's prior written consent.

1.4 No Substantial Return Benefit

SAAHP will provide the listed sponsor no "substantial return benefit" as defined in Section 513(i) of the IRS Advertising or Qualified Sponsorship Code and accompanying regulations. For clarity, any acknowledgment or identification of the listed sponsor will (a) be limited to a statement of acknowledgment or thanks and may include display of the sponsor's marks in accordance with section 2, and (b) not include any qualitative or comparative language, references to price, savings or value information regarding any of the listed sponsor's products or services.

1.5 No Endorsement by Client

Under no circumstances will SAAHP be expected to endorse or promote the listed sponsor or its products and services, nor will any such endorsement or promotion be implied or construed based on SAAHP's acceptance of the sponsorship, acknowledgment or identification of the listed sponsor. The sponsor will not state or imply, orally or in writing, that SAAHP, or its respective officers, directors, or employees, endorse the listed sponsor.

1.6 Non-Exclusive Sponsorship

Unless otherwise provided in this sponsorship agreement, the sponsorship is non-exclusive. The listed sponsor understands that SAAHP may enter into corporate sponsorship or other similar arrangements with other institutions, organizations or companies.

2. INTELLECTUAL PROPERTY

2.1 Sponsor Logo or Insignia

The listed sponsor grants SAAHP a non-transferable, non-exclusive, non-sublicensable, revocable license to use, copy, and display for the limited purposes set out in Section 1.3.

2.2 Ownership

SAAHP and the listed sponsor acknowledges that (a) it has no interest in the other party's logo or insignia other than the license granted under this agreement, (b) the other party will remain the sole and exclusive owner of all right, title, and interest in its marks, and (c) any and all goodwill in the other party's logo or insignia will inure solely to the benefit of the other party. SAAHP and the listed sponsor will comply with any reasonable trademark guidelines that the other may provide. For clarity, nothing in this agreement is intended to give the sponsor any ownership or other rights in any SAAHP property or client-related property created in connection with the sponsorship including, without limitation, intangible property such as trademarks, event attendee lists, or mailing lists.

2.3 Non-Permitted Associations

The listed sponsor may not use SAAHP's logo in any manner that suggests or implies endorsement of the sponsor, its political views or religious beliefs, including, without limitation, in connection with any campaign activity for or against a political candidate or in connection with any lobbying activity.

3. RELATIONSHIP

3.1 Contact Person

SAAHP and the sponsor will each appoint one individual to act as a principal contact person and to facilitate communication. SAAHP and the listed sponsor each may change its contact person at any time and will so notify the other.

3.2 Recordkeeping

Client and Sponsor will maintain records relating to the Sponsorship in a manner such that each party can evaluate compliance with this agreement and will make those records available for review by one another on reasonable notice during the term of this. Client and Sponsor will each reasonably cooperate with one another in providing information relating to its activities under this Agreement in connection with any financial or tax audit, or similar matter, in which the other is engaged.

3.3 Independence

SAAHP and the listed sponsor are and will remain independent contracting parties. Nothing in this Agreement creates an employment, partnership, joint venture, fiduciary, or similar relationship between SAAHP and the listed sponsor for any purpose. Neither SAAHP nor the sponsor has the power or authority to bind or obligate the other to a third party or commitment in any manner. Any use of the term "partner" or comparable term in any communication is solely for convenience.

3.4 Confidentiality

The listed sponsor will use confidential information (as defined below) only in connection with the sponsor's activities under this agreement and keep it confidential. "Confidential Information" means all information, in any form, furnished to or obtained by the sponsor from SAAHP including, without limitation, project plans and strategies, donor data, and budget and other financial data. It does not include information which: (a) is or becomes generally available to the public other than as a result of a disclosure by SAAHP; (b) was known by the sponsor prior to being furnished by SAAHP; (c) is or becomes available to the sponsor on a non-confidential basis from a source other than SAAHP; or (d) is independently developed by the sponsor.

4. INDEMNIFICATION

4.1 Indemnification by SAAHP

SAAHP will indemnify, defend, and hold the listed sponsor and their respective directors, officers, employees, agents, and assigns (collectively, "Sponsor Parties") harmless from and against any and all third party claims, liabilities, damages, and expenses, including, without limitation, attorneys' fees and expenses, resulting from (a) SAAHP's performance under or breach of this agreement or (b) any third party claim that the sponsor's use of SAAHP's logo in accordance with the terms of this agreement infringes such party's trademark, copyright, trade secret, or other intellectual property rights. SAAHP will have no obligation to indemnify the sponsor to the extent the liability is solely caused by such sponsor's gross negligence or willful misconduct.

4.2 Indemnification by Sponsor

The listed sponsor will indemnify, defend, and hold SAAHP and their respective directors, officers, employees, agents, and assigns (collectively, "SAAHP Parties") harmless from and against any and all third party claims, liabilities, damages, and expenses, including, without limitation, attorneys' fees and expenses, resulting from (a) the sponsor's performance under or breach of this agreement or (b) SAAHP's use of the sponsor marks in accordance with the terms of this agreement. The sponsor will have no obligation to indemnify an SAAHP party to the extent the liability is solely caused by such SAAHP party's gross negligence or willful misconduct.

5. TERMINATION

5.1 Termination on Notice

The sponsor or SAAHP may, on its own, terminate this agreement at will or for any given reason by providing written notice of that decision to the other. Such termination will be effective after the delivery of the notice by the terminating party.

6. GENERAL PROVISIONS

6.1 Entire Agreement

This agreement, together with the sponsorship plan and the other exhibits, expresses the final, complete, and exclusive agreement between SAAHP and the listed sponsor, and supersedes any and all prior or contemporaneous written and oral agreements, arrangements, negotiations, communications, course of dealing, or understanding between SAAHP and the sponsor relating to its subject matter.

6.2 Amendment

This agreement may be amended only in writing signed by both SAAHP and the sponsor. If there are any inconsistencies between an amendment and this agreement, this agreement will control.

6.3 Severability

If any provision in this agreement is held invalid or unenforceable, the other provisions will remain enforceable, and the invalid or unenforceable provision will be considered modified so that it is valid and enforceable to the maximum extent permitted by law.

6.4 Waiver

Any waiver under this agreement must be in writing and signed by the party granting the waiver. Waiver of any breach or provision of this agreement will not be considered a waiver of any later breach or of the right to enforce any provision of this agreement.

6.5 Assignment

The sponsor may not assign its rights or delegate its duties under this agreement to anyone else without the prior written consent of SAAHP.

6.6 Governing Law

This Agreement is governed by Florida law.

6.7 No Third-Party Beneficiaries

Except as provided, this agreement is for the exclusive benefit of SAAHP and the sponsor and not for the benefit of any third party, including, without limitation, any employee, affiliate, subcontractor, or vendor of SAAHP or the sponsor.

6.8 Notices

Notices and consents under this agreement must be in writing and delivered by mail, hand delivery, fax, or e-mail to the contact persons set out in the sponsorship plan. These addresses may be changed by written notice to the other party.

6.9 Force Majeure

Neither party will be required to perform or be held liable for failure to perform if nonperformance is caused by labor strikes, work stoppages, war, hostilities, national emergency, acts of God, epidemics or pandemics, quarantines, natural disasters, power failures, or any other causes beyond the control of the party unable to perform. The non-performing party will notify and consult with the other party regarding the event and how to minimize its impact, and in all cases will make reasonable efforts to address the problem and carry out its obligations.

6.10 Counterparts

This agreement may be executed in one or more counterparts, each of which will be deemed an original and all of which will be taken together and deemed to be one instrument. Transmission by fax or PDF of executed counterparts constitutes effective delivery.

7.0 Signature

* * * * *

Please enter the information below and submit to SAAHP to agree to the terms and confirm your sponsorship.

The Southeastern Association of Advisors
for the Health Professions (SAAHP), Inc.

SAAHP Authorized Signer:

Title: President, SAAHP

Date: _____

[Name of Sponsor]:

Sponsor Authorized Signer:

Title: _____

Date: _____

Witness:

Title: _____

Date: _____

Appendix B

Code of Conduct Definitions

Being considerate and respectful to each other. *Example: Avoid interrupting others, be mindful of differing viewpoints, and show respect for all individuals, regardless of their background, identity, or experience level. Be aware of your laptops and phones and minimize distractions (volume, screen brightness, etc.)*

Communicating openly and thoughtfully and encourage others to do the same. Share your ideas and perspectives clearly and constructively. *Example: Active listening, asking clarifying questions, and providing constructive feedback are all key aspects of open and thoughtful communication. This also prohibits sexual harassment, racial slurs, discriminatory jokes, and any form of personal attacks.*

Refraining from harassing, discriminatory or demeaning conduct. *Example: Being complicit with all rules, policies, and procedures of facilities or organizations, including adhering to local laws and regulations. Example: This may include rules about noise levels, food and drink consumption, and the use of conference/meeting facilities. This may also include obeying traffic laws, respecting local customs, and adhering to any public health guidelines in place.*

Guidelines for Online Events

- Mute your microphone when you are not speaking to minimize distractions for other participants.
- Be mindful of your background and ensure it is professional and appropriate for the meeting.
- Follow the instructions provided by the person leading/presenting regarding the use of chat, Q&A features, and other online meeting tools.

Unacceptable Behavior

Examples of unacceptable behavior are listed below. This list is not exhaustive. Any behavior that creates a hostile or uncomfortable environment for others will not be tolerated.

- Disruptive and Disrespectful Behavior: This encompasses any actions that interfere with the smooth flow of events/meetings or show a lack of regard for others. Examples include:
 - Loud talking or interruptions during presentations.
 - Making inappropriate comments or jokes.

- Using electronic devices in a distracting manner.
- Physical or Verbal Abuse: This covers any form of mistreatment, including:
 - Physical violence (hitting, pushing, etc.).
 - Verbal aggression (yelling, insults, threats).
- Discrimination and Harassment: This prohibits any form of bias or offensive behavior based on:
 - Race, ethnicity, religion, gender, sexual orientation, gender identity, disability, age, or any other protected characteristic.
- Sexual Harassment and Assault: This encompasses a wide range of inappropriate behaviors, including:
 - Unwelcome sexual advances or requests.
 - Offensive jokes or comments.
 - Inappropriate touching.
 - Stalking or intimidation.

Appendix C

Statement of Personal and Professional Standards of Conduct and Conflict of Interest

SAAHP Board defines individual or personal conflict of interest (COI) as a situation where a Board Member is in a position to influence the business or other decisions of the Association in relationship to an outside organization that could lead to financial or other form of significant gain for that individual or the family of that individual, or give improper advantage to others to the detriment of SAAHP.

Please initial below to certify below that you either have nothing to report that could give rise to a possible conflict of interest under the policy described above, or disclose any possible conflict:

_____ I have nothing to report

_____ I have the following matters to report (examples include, but are not limited to, other boards on which you or a close family member sits; any for profit businesses for which you or a family member is an owner, stakeholder, employee, etc.; any entity, beyond your college or university, that employs your services on a consulting or other paid basis):

1. _____
2. _____
3. _____

Infractions of this Statement of Personal and Professional Standards of Conduct and Conflict of Interest are to be reported directly to the SAAHP President and/or other Board Member(s) for further investigation and discussion. Infraction may be reported by any SAAHP Advisor Member who believes they have observed or have knowledge of possible infraction—regardless of whether the infraction was made by oneself or another SAAHP Board Member.

Should it be determined that an infraction occurred after investigation and discussion are complete, depending on the severity of the infraction, the SAAHP Board will determine appropriate sanctions. Sanctions may include suspension or removal from the SAAHP Board and notification to the NAAHP Executive Committee as appropriate.

I hereby certify that the information set forth is true and complete to the best of my knowledge. I also understand that if in doubt, I will err on the side of disclosure for complete transparency.

Printed Name _____

Signature _____

Date _____