

AASFAA Long-Range Plan

2014 - 2019

1. ORGANIZATIONAL STRUCTURE

EXECUTIVE BOARD

GOAL:

Ensure that the Executive Board is structured appropriately to accomplish the goals of the Association.

OBJECTIVE:

- The Executive Board will review the makeup, organization, and responsibilities of the Executive Board on an annual basis.

GOAL:

Ensure that the terms of office for elected officers are of sufficient length to ensure continuity and to complete official business while providing opportunities for new leadership.

OBJECTIVE:

- The Executive Board will review the terms and composition of elected officers at least once every five years.

GOAL:

Ensure that processes and procedures effectively facilitate the transition of leadership for the Executive Board and committees.

OBJECTIVE:

- The Executive Board will review the board retreat concept to facilitate transition of office between the outgoing and incoming board members.

GOAL:

Ensure the advice and assistance provided to the Board by committee chairs is such that the goals of the Association are readily accomplished, future leadership is developed, and Board activities remain fiscally responsible.

OBJECTIVE:

- Committee goals and objectives should be developed annually by the President and other Executive Board Members to meet the goals and objectives of the AASFAA Long-Range Plan and recommendations shared with the Board for consideration.
- The President will select an appropriate group of returning and new committee chairs to ensure continuity of Association business and development of future leadership.
- The President will require that each committee provides a written annual summary of its activities so this information may be included in the President's annual report.

COMMITTEES

GOAL:

Ensure that committees are of sufficient size and number and represent the diversity of the membership to accomplish the goals of the Association and to develop future leadership.

OBJECTIVES:

- Appoint committee members, to the extent possible, which reflects the sector, gender, and ethnicity of the Association.
- Ensure that standing committees with broadly defined responsibilities include one representative from each sector, to the extent possible.
- Ensure that other committees, unless otherwise specified in the Bylaws, function with the fewest number of members sufficient to accomplish the goals of that committee.
- Ensure that the committee chair, if responsible for making his/her committee appointments, makes every effort to select an appropriate group of returning and new members to assure the continuity of committee business and the development of future leadership.
- Consider alternatives to on-site meetings whenever possible to keep costs at the most reasonable level. Such alternatives include conference calls, electronic mail and arranging committee meetings in conjunction with other meetings where some committee members would normally be in attendance.
- Ensure that committee meetings are held at such times and locations and keep travel and lodging costs to a reasonable level.

MEMBERSHIP

GOAL:

Assess the current membership structure to confirm that it represents the composition of financial aid professionals in the state.

OBJECTIVES:

- The Membership Committee will review current membership categories, voting privileges and related issues for future planning.
- The Membership Committee will evaluate membership categories and aggressively seek to increase membership in under-represented areas by accomplishing the objectives named below.

- The Membership Committee will conduct a survey at least once every five years to determine membership needs.

GOAL: Promote and encourage active participation by all members in activities of the Association.

OBJECTIVES:

- The Membership Committee will provide specific opportunities for new members at various Association events.
- The Membership Committee will provide mentoring opportunities for new members as requested and assigned.
- The Membership Committee will incorporate ideas which surface from membership survey in order to meet the above goals and objectives.
- The Membership Committee will promote continued involvement among all members through various specified communications and events.

2. OPERATIONS

BYLAWS

GOAL:

The Bylaws Committee, in conjunction with the Executive Board and Long-Range Planning/Governance Committee, will ensure that the Bylaws reflect the mission of the Association and support the viability of the organization.

OBJECTIVE:

- Bylaws will be reviewed annually by the Bylaws Committee to ensure that they continue to further the mission of the Association.

POLICIES AND PROCEDURES

GOAL:

Ensure that the policies and procedures are accurate and complete, further the mission of the Association, ensure fiscal integrity, and support the viability of the Association.

OBJECTIVES:

- The Policies and Procedures Committee will establish a procedure to ensure that the policies and procedures are accurate and complete and that the Association is in compliance with these rules.
- The Policies and Procedures Committee will annually review the policies and procedures to ensure that they continue to further the mission of the Association and its financial integrity.

- The Policies and Procedures Committee will ensure that officers and committee chairs are responsible for the review and updating of all policies under their purview.
- The secretary shall be responsible for reviewing and updating as appropriate, all other policies and procedures.
- The Policies and Procedures Committee will ensure that any recommendations for policies and procedures changes be approved by the AASFAA board.
- The Policies and Procedures Committee will once every five years, obtain copies of policies and procedures from other state associations in the SASFAA region, as well as from other regional associations, to identify areas of potential weaknesses in AASFAA's policies and procedures.

ARCHIVES/HISTORY

GOAL:

Maintain the records of the Association.

OBJECTIVES:

- The Archives Committee will establish procedures to maintain records of the Association electronically.
- The Archives Committee will periodically review the methods used to maintain records.
- The Archives Committee will ensure the accessibility and continuity of the Association's records.

COMMUNICATION/COLLABORATION

GOAL:

Enhance alliances between and among various sectors and diverse members of the student financial aid community.

OBJECTIVE:

- The Membership Committee will involve all sectors of AASFAA's financial aid community to ensure representation and participation in all Associational programs and activities.

GOAL:

Review, develop, and enhance AASFAA publications and methods of information dissemination to enhance communications among members in a timely and cost-efficient manner.

OBJECTIVES:

- The Communication/Newsletter Committee will provide timely information useful to all sectors of the membership.

- The Vice President will develop a Master Calendar each year.
- The Membership Committee will provide a means for networking between and among all sectors of the membership.
- The Communication/Newsletter Committee will enhance the use of new and emerging technologies (i.e., internet, etc.) as a more timely and cost-efficient means of communicating with the membership.
- The Communication/Newsletter Committee will review current communication methods to the membership and aggressively pursue the use of technology as a routine avenue to conduct Association business.

GOAL:

Analyze, determine, and implement the most effective means of electronic communication capabilities for the AASFAA membership, using technology as a means of communication to members, where appropriate.

OBJECTIVES:

- The Membership Committee in conjunction with the Communication/Newsletter Committee will increase use of website by AASFAA's members.
- The Membership Committee in conjunction with the Communication/Newsletter Committee will increase use of electronic mail lists by AASFAA's members.
- The Membership Committee in conjunction with the Communication/Newsletter Committee will determine appropriate media for various modes of communication with members, reducing the number of documents that need to be provided in paper format where feasible.
- The Membership Committee in conjunction with the Communication/Newsletter Committee will encourage membership use of electronic communication technology with training and informational activities.

LEGISLATIVE RELATIONS

GOAL:

Apprise members of legislative issues affecting the profession, educate members of alternative approaches, advocate involvement on issues and advocate positions when reasonable consensus exists.

OBJECTIVES:

- The State Legislative Committee will apprise members of legislative issues affecting the profession.
- The State Legislative Committee will educate members of alternative approaches.
- The State Legislative Committee will advocate timely, effective involvement on issues affecting the profession.
- The State Legislative Committee will advocate positions when a reasonable consensus exists.

PROFESSIONAL DEVELOPMENT

GOAL:

Provide for the professional growth and competencies of members by offering workshops, seminars, meetings and other training opportunities to meet the needs of the membership.

OBJECTIVES:

- The Professional Development Committee will determine the training and professional development needs of members, recognizing distinctions among members such as experience, institutional type, and level of responsibility by working with the Membership Committee via survey analysis.
- The Professional Development Committee will work to provide opportunities to train members in other areas that directly or indirectly affect student aid, e.g., business office, enrollment issues, and computer technology.
- The Professional Development Committee in conjunction with the Conference Planning Committee will evaluate the content of conferences and training efforts to ensure they provide current information and meet the needs of the membership.
- The Professional Development Committee in conjunction with the Conference Planning Committee will provide diverse topics recognizing both the need for regulatory and technical knowledge, as well as the need for skills in management and human relations at various workshops, conferences and training events.
- The Professional Development Committee will provide open forum opportunities to accommodate timely topics.
- The Professional Development Committee will recognize and encourage the development of formal and informal “networking” strategies for sharing information and locating job opportunities.
- The Professional Development Committee will recognize and provide opportunities for pre- and post-conference training activities.
- The Professional Development Committee will encourage participation in professional development activities by experienced members who represent the diversity of the membership and are capable of motivating and teaching others.
- The Professional Development Committee in conjunction with the Conference Planning Committee will provide training sites that are accessible to the membership and financially feasible.
- The Professional Development Committee will provide special attention to new technologies as both an object of training efforts and as a vehicle for presenting training, discussion, and advancement.
- The Professional Development Committee in conjunction with the Conference Planning Committee will cooperate with other organizations such as the Southern Association of Student Financial Aid Administrators, the National Association of Student Financial Aid Administrators, and the Department of Education to maintain appropriate training opportunities for the membership.

FINANCES

GOAL:

Provide and ensure the future financial stability of AASFAA through careful and regular planning and evaluation.

OBJECTIVES:

- The Treasurer and Treasurer-Elect will annually determine the appropriateness of fees assessed for dues, professional conferences, training workshops, and sponsorship support.
- The Treasurer and Treasurer-Elect will maintain a financial strategy that will result in the Association having a reserve fund sufficient to support customary Association activities for at least three years.
- The Treasurer and Treasurer-Elect will review annually, all risks and potential liabilities affecting cash management and contractual obligations to ensure Association bonding/coverage is sufficient.
- The Treasurer and Treasurer-Elect in conjunction with the Budget Committee will outline parameters for developing the Association's operating budget, ensuring that it is always balanced.
- The Treasurer and Treasurer-Elect will recommend means for review of financial management practices (audits) to ensure fiscal responsibility in accordance with generally accepted accounting principles and management standards and guidelines.
- The Treasurer and Treasurer-Elect will conduct an annual review of the Association's investment strategies to ensure solvency and growth of special program funds.
- The Treasurer and Treasurer-Elect in conjunction with the Budget Committee will incorporate the financial impact of vendor sponsorship in the budget planning process annually.

SCHOLARSHIP

GOAL:

Ensure that the Association assists students in securing financial assistance to pursue college - level studies by continuing the Legacy Scholarship Program.

OBJECTIVE:

- The Scholarship Committee will review annually, the Association's financial status and award scholarships to the extent possible.