

SASFAA LONG-RANGE PLAN
2001-2006

ORGANIZATIONAL STRUCTURE

BY-LAWS

GOAL: *Ensure that the By-Laws reflect the mission of the Association and support the viability of the organization.*

OBJECTIVE:

- *Review annually to ensure that the By-Laws continue to further the mission of the Association.*

EXECUTIVE BOARD

GOAL: Ensure that the terms of office for elected officers be of sufficient length to provide continuity and to complete official business while providing opportunities for new leadership.

OBJECTIVE:

- Review the terms and composition of office of elected officers at least once every five years.

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

OBJECTIVES:

- Assess the purpose and need for each committee when making committee chair/liaison appointments.
- Consider whether all committee chairs should be in attendance at all executive board meetings, keeping in mind the need to develop future leadership for the association yet maintaining the ability to conduct business at the lowest, most reasonable cost.
- Select an appropriate mix of returning and new committee chairs to ensure the continuity of executive board business and the development of future leadership.
- Ensure that committee chair appointments, to the extent possible, reflect the *diversity of the Association, including* sector, gender and ethnicity.

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 while being fiscally responsible.

OBJECTIVES:

- Appoint committee members, to the extent possible, who represent *diversity including* sectors, genders, and ethnicity.
- Ensure that committees with broadly defined responsibilities such as legislative relations, professional development and the annual conference include *at least* one representative from each state in the region.
- Ensure that other committees, unless otherwise specified in the By-Laws, 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 mix of returning and new members to assure the continuity of committee business and 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 that keep travel and lodging costs to a reasonable level.
- Ensure that each committee provides a written annual summary of its activities so this information may be included in the president's annual report.

MEMBERSHIP

GOAL: Ensure that the membership of the Association represents the composition of financial aid professionals in the region.

OBJECTIVES:

- Review membership categories and aggressively seek to increase membership in under-represented areas.
- Undertake a review of the membership categories for appropriateness at least once every five years.
- Review membership structure at least once every five years to determine if membership should be individual, institutional or on some other basis.
- Explore additional membership categories such as associate (non-voting) membership for former aid administrators, students, guidance counselors, or others.
- *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:

- *Provide opportunities for the participation and growth of new members.*
- *Promote continued involvement among all members.*

POLICIES AND PROCEDURES

GOAL: Ensure that the policies and procedures are accurate and complete *in order to provide consistent Associational direction.*

OBJECTIVES:

- Establish a procedure to ensure that the policies and procedures are accurate and complete and that the Association is in compliance with these rules.
- Review the policies and procedures annually to ensure that they continue to further the mission of the Association and its financial integrity.
- 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.
- Ensure that any recommendations for policies and procedures changes be approved by the SASFAA board.

GOAL: *Maintain the records of the Association.*

OBJECTIVES:

- *Establish procedures to maintain the records of the Association.*
- *Periodically review the methods and location used to maintain records.*
- *Ensure the accessibility and continuity of the Association's records.*

COMMUNICATION/ COLLABORATION

GOAL: *Facilitate* alliances between and among various sectors *and diverse members* of the financial aid community.

OBJECTIVES:

- Work with all sectors of the region's financial aid community to ensure representation and participation in all Association programs and activities.
- Provide membership services so the needs and interests of all sectors are addressed fairly and equitably.
- Serve as a link with and between various sectors of the Association, and as a link between the state associations and the National Association of Student Financial Aid Administrators.

GOAL: Disseminate information to enhance communications among members in a timely and cost-efficient manner.

OBJECTIVES:

- Provide timely information useful to all sectors of the membership.
- Address a full range of issues, ranging from policies to daily operations.
- Provide the SASFAA president's annual report to the membership in accordance with Section 1, Article 7 of the By-Laws.
- Provide a means for networking between and among all sectors of the membership.
- 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.

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

OBJECTIVES:

- Apprise members of legislative issues affecting the profession.
- Educate members of alternative approaches.
- Encourage *timely, effective involvement in financial aid* issues affecting the profession.
- 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:

- Determine the training/professional development needs of members, recognizing categorical distinctions among members such as experience, institutional type, and level of responsibility.
- Improve and enhance the annual conference on the basis of systematic reviews and evaluation of previous conferences, as well as current needs of members.
- Present programs and sessions possessing both vitality and relevance for all members.
- Provide a diversity of topics recognizing both the need for regulatory and technical knowledge, as well as the need for skills in management and human relations.
- Provide open forum opportunities to accommodate timely topics not considered when the program was planned.
- Recognize and encourage the development of informal "networking" strategies for sharing

information and locating job opportunities.

- Encourage worthy and thought-provoking *research, publications and presentations* by members.
- Recognize and provide opportunities for pre- and post-conference training and recreational activities.
- Continue to provide an annual, intensive training workshop designed to provide new aid administrators the basic framework of knowledge needed to administer student financial assistance programs.
- Encourage participation in professional development activities by experienced members who represent the diversity of the membership and are capable of motivating and teaching others.
- In cooperation with other organizations such as the National Association of Student Financial Aid Administrators and the Department of Education, maintain a core curriculum with revisions and updates as necessary.
- Provide training sites which are geographically accessible, financially feasible, and educationally enhancing.
- Offer periodic opportunities for experienced aid administrators to grow in leadership, management, and other advanced functions of aid administration.
- Offer advanced training programs and seminars for experienced members on unique topics related to financial aid administration after considering whether such activities are geographically accessible, financially feasible, and educationally enhancing.
- Provide special attention to new technologies as both an object of training efforts and as a vehicle for presenting other topics for training, discussion, and advancement.

FINANCES

GOAL: Ensure fiscal integrity.

OBJECTIVES:

- ***Adhere to the practices outlined in the SASFAA Guide to Financial Management.***
- ***Review the SASFAA Guide to Financial Management periodically to ensure the continuity of sound financial practices.***

GOAL: Provide for and ensure the future financial stability of the Association through careful and regular planning and evaluation.

OBJECTIVES:

- Determine the appropriateness of fees assessed for dues, the annual conference, workshops and ancillary services including vendors, at least once every five years.

- Provide for the establishment, maintenance, investment, and monitoring of a sufficient Associational reserve fund.
- Review routinely all risks and liabilities affecting cash management and contractual obligations.
- Determine the appropriate cash balance to be brought forward annually.
- ***Periodically evaluate the financial impact of vendor sponsorship.***

Prepared by the **1999-2000** Long Range Planning Committee

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