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SASFAA Long Range Plan

Approved by the SASFAA Executive Board February 1996

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INTRODUCTION

The Southern Association of Student Financial Aid Administrators (SASFAA) was established in 1963 with the primary purpose of promoting the professional development of campus aid administrators and others involved in student financial aid programs, and assisting in the development and improvement of student aid programs. The specific purposes of SASFAA are delineated in the association's [By-Laws](#).

Although the basic purpose of assisting deserving students remains, changing circumstances impact the programs, activities, and services of the association. Long-range planning, thus, becomes an essential component in charting the organization's direction.

Long-range planning for an entity that encompasses the diversity of a professional association such as SASFAA cannot occur in a vacuum. Changing responsibilities of aid professionals, new functions for service agencies, changing financial support for association functions and activities, and new and different needs of the membership

impact directly and indirectly on our mission, structure, operation and services.

In 1994-95, President Dave Cecil determined that changing roles for financial aid administrators and changing vendor support for the association warranted a review of SASFAA's purposes and development of long-range plans for membership services and financial support.

He appointed the [long-range planning committee](#) and outlined the following goals and objectives for the committee:

- To develop a proposed recommendation outlining the scope and responsibilities of a Long-Range Planning Committee for SASFAA.
- To assess actual and/or perceived opportunities or threats to the viability of the SASFAA organization, finance, membership or activities.
- To determine if identified opportunities/threats should be examined in detail for referral/assignment to an appropriate SASFAA committee.
- To communicate to the SASFAA membership through the newsletter the role and purposes of the Long-Range Planning Committee.

To accomplish those goals the committee first met in Atlanta, October 14 - 15, 1994 and:

- Reviewed long-range plans from other state and regional financial aid associations;
- Reviewed two previous SASFAA membership surveys conducted by the 1988-89 Long-Range Planning Committee and the 1991-92 Special Projects Committee.
- Reviewed the last five years of the association's budgets;
- Reviewed the association's purposes in relation to its goals and objectives.

As a strategy for outlining long-range plans for the association, committee members set as a goal for the year the preparation of a mission statement and a vision statement, an evaluation of communications to the membership, and an assessment of the association's fiscal stability and reserve funds. A survey was sent to 91 past Board members to solicit comments, suggestions and/or changes to the proposed statements. Of the 91 members surveyed, 23 responded. The proposed vision and mission statements and requests for comments were published in the SASFAA newsletter and also were distributed at the annual conference.

A membership survey was distributed at the conference; 125 members responded and generally expressed satisfaction with services offered. The areas of communications, publications, and training received positive comments whereas questions about newsletter format received negative comments.

The committee met February 12, 1995 prior to the annual conference to review the status of goals assigned to the committee. They also planned and staffed a booth at the annual conference and sought members' opinions about SASFAA and the committee's proposals.

The committee met in Charlotte, North Carolina, April 8-9, 1995 to develop an outline of the goals of the association. The outline was divided into sections as follows: [Organizational Structure](#), [Collaboration/Communication](#), [Professional Development](#), and [Financial Stability](#). The [Mission](#) and [Vision](#) statements were endorsed by the committee and recommended to the executive board and the SASFAA membership at the June, 1995 board meeting. The executive board approved the Mission and Vision Statements at the June, 1995 executive board meeting. See page 5.

1995-96 SASFAA President Karen Fooks recommended to the executive board the continuation of a Long-Range Planning Committee and outlined the following responsibilities for the committee:

- Complete activities for development of the long-range plan so a draft can be submitted for approval at the November board meeting, final approval by February, and distribution to the membership in the spring.
- Work with the budget, sponsorship and conference chairs to assist in developing a financial plan for the association in order to respond to the potential loss of sponsorship and make recommendations to the board on how the association could minimize this effect.
- Work with the treasurer and budget chair to develop/maintain a long-term investment strategy for reserve funds.
- Present a plan by the June board meeting for on-going monitoring of the approved long-range plan.
- Work with the vice president on the development of a long-range training and professional development strategy.

On September 29 - 30 and October 1, the committee met in Atlanta to begin formalizing the long-range plan. Also, two members of the committee reviewed the past eight years of financial statements of the association to attempt to establish patterns of revenue and expenditures. A report of these findings, as well as a progress report on the long-range plan, was presented to the executive board in November, 1995.

The SASFAA Executive Board approved the Long-Range Plan at its February board meeting. The plan was published for the membership in the spring SASFAA newsletter. Subsequently, the Long-Range Planning committee met May 4 - 5, 1996 in Atlanta and developed a procedure to implement and evaluate the plan.

SUMMARY

The Long-Range Plan consists of four major sections:

* Organizational Structure

* Communication/Collaboration

* Professional Development

* Finances

For each section, specific goals and objectives are identified which are consistent with the mission and vision statements of the association.

The members of the Long-Range Planning Committee recognize that a long-range plan can never become "final". Any organization involved with the dynamics of public policy, budget concerns at both state and national levels, and the real issues of students and families, must continually evaluate its role and scope.

MISSION STATEMENT

The Southern Association of Student Financial Aid Administrators was founded in order to establish a community of members, who through the sharing of ideas and professional competencies and experiences would serve more ethically and effectively the diverse needs of students, parents, and institutions. The present and future existence of the association continues to be based on this founding principle.

To facilitate this mission, the association pledges to support professional communications in all areas concerned with the administration of student educational financing programs. The association is committed to developing future leaders by actively involving its membership. To accomplish the goals set forth by the association in a dynamic environment, the Southern Association of Student Financial Aid Administrators offers personal and professional development opportunities and embraces sound principles and practices of aid administration.

VISION STATEMENT

The Southern Association of Student Financial Aid Administrators is a dynamic organization serving practitioners, users and providers of student financial aid programs. This effort occurs in an environment of mutual respect and support which encourages questions, discussion and the shaping of ideas - thus promoting opportunities, equity and access in and to higher education.

SASFAA LONG-RANGE PLAN

ORGANIZATIONAL STRUCTURE

EXECUTIVE BOARD

GOAL: Ensure that the terms of office for elected officers be of sufficient length to ensure 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 sector, gender and ethnicity representative of the association.

COMMITTEES

GOAL: Ensure that committees are of sufficient size and number 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 the sectors, genders, and ethnicity of the association.
- Ensure that committees with broadly defined responsibilities such as legislative relations, professional development, and the annual conference include 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, make 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.

POLICIES AND PROCEDURES

GOAL: Ensure that the By-Laws and policies and procedures are accurate and complete, further the mission of the association, ensure fiscal integrity, and support the viability of the association.

OBJECTIVES:

- Establish a procedure to ensure that the By-Laws and policies and procedures are accurate and complete and that the association is in compliance with these rules.
- Review the By-Laws and 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.
- Obtain copies of policies and procedures from state associations in the region, as well as from other regional associations once every five years to identify areas of potential weaknesses in SASFAA's policies and procedures.

COMMUNICATION/ COLLABORATION

GOAL: Enhance alliances between and among various sectors of the financial aid community.

The SASFAA membership includes many sectors of the student aid community located in the nine states of the association's region. Services to these sectors are provided through representation on the executive board and other committees of the association, special sessions at the annual conference, membership services, and networking. In addition, SASFAA serves as the regional link between state financial aid associations and the National Association of Student Financial Aid Administrators.

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.
- Promote mentorship opportunities for all sectors of the financial aid community.

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

SASFAA has used a variety of mechanisms to disseminate information and data -- newsletters, directories, bulletins, guides and brochures, and other publications-- needed by all sectors of the association's membership to perform their duties and responsibilities more effectively. The SASFAA newsletter is one of the means of communicating general information to the membership. Other means of communication include a membership directory, a minority directory, bulletins, guides and brochures, and other publications.

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.

As a professional association, SASFAA has the responsibility to inform members of legislative issues affecting the operation or administration of student financial aid and the delivery of funds to students attending postsecondary institutions. In fulfilling its communication responsibility to the membership, SASFAA should outline and delineate alternative approaches for addressing the issues and concerns affecting the student financial aid profession. Whenever reasonable consensus exists on issues (e.g. support for federal work study or federal grant programs), the association has the responsibility to advocate support for these positions.

OBJECTIVES:

- Apprise members of legislative issues affecting the profession.
- Educate members of alternative approaches.
- Encourage involvement on 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.

Professional development can be considered the heart of any professional association. The impetus for the initial organization of such a group relates to the common interests of a number of people, combined with a common desire to improve professional skills. SASFAA addresses this goal by continuous assessment of professional development needs and by offering annual meetings, workshops, and other training opportunities.

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 the presentation of worthy and thought-provoking papers 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: 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.

Prepared by the 1994-95/1995-96 Long Range Planning Committees

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