

# SASF AA Goals and Activities for 2017-18

<b>GOAL 1: Ensure the association is legally sound.</b>
<ul style="list-style-type: none"> <li>○ Ensure approved changes to By-Laws from June 2017 meeting are placed on this year's election ballot</li> <li>○ After election, form new By-Laws committee with all new members to do yearly review of By-Laws</li> </ul>
<b>GOAL 2: All actions adhere to the guiding principles of the by-laws.</b>
<ul style="list-style-type: none"> <li>○ Ensure all governing documents are updated and that By-Laws documents are also on the whiteboard</li> </ul>
<b>GOAL 3: Policy and Procedures shall be reflective of current practices and shall be compliant with the By-law.</b>
<ul style="list-style-type: none"> <li>○ Organize secretary thumb drive, date documents, and ensure the documents are backed up in multiple areas</li> <li>○ Remind and work with all committee chairs to review the P&amp;P during the year so as to find and make corrections/clarifications when needed</li> <li>○ Update P&amp;P after each board meeting making sure to capture all approved changes. Update the web and be sure that in the document and on the web update the date of change</li> </ul>
<b>GOAL 6: The SASFAA Board of Directors (elected and appointed) should be reflective of the diversity of the organization, be knowledgeable financial aid practitioners, Involved, engaged and committed to the success of the organization.</b>
<ul style="list-style-type: none"> <li>○ Board of Directors will understand the responsibilities and time commitment of their positions</li> <li>○ Send job responsibilities to potential committee chairs prior to committee chair selection</li> <li>○ Committee goals and objectives will be developed during the transition meeting and goals will be published on the website</li> </ul>
<b>GOAL 7: Committees should represent the mosaic abilities of the membership.</b>
<ul style="list-style-type: none"> <li>○ Vet committee members who are considered for committees</li> <li>○ The President Elect will review the SASFAA Volunteer form to ensure that the detailed qualifications, state affiliation and interests of the volunteers are met. Any recommended changes will be brought to the SASFAA board no later than the February 2018 board meeting</li> <li>○ Update volunteer form to remove affiliation and add membership category</li> <li>○ Develop summary of committee's composition to be included in the President's annual report</li> </ul>
<b>GOAL 8: Increase membership.</b>
<ul style="list-style-type: none"> <li>○ An email outlining the benefits of SASFAA membership will be sent to state presidents for distribution on state email lists to market SASFAA at the state level</li> <li>○ NAOW participants membership dues should be active for 2017-18</li> <li>○ A communication plan will be implemented in conjunction with the 17-18 membership launch to encourage new and renewal applications. System settings and automated emails will be utilized for renewal reminders. An email outlining the benefits of SASFAA membership will be sent to state presidents for distribution on state lists in an effort to reach out to potential new members. Membership application information will be placed</li> </ul>

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<p>on the home page of the website. The membership services page will be updated in consultation with the president emphasizing the benefits of membership and the updated membership categories</p>
<p><b>GOAL 9: Expand mentoring opportunities.</b></p>
<ul style="list-style-type: none"> <li>○ Membership application provides the opportunity for new members to indicate interest in mentoring opportunities</li> </ul>
<ul style="list-style-type: none"> <li>○ Develop a Mentorship Guide</li> </ul>
<ul style="list-style-type: none"> <li>○ Perform tasks similar to 15-16 Membership Chair to re-establish a mentorship program</li> </ul>
<p><b>GOAL 10: Expand the benefits of membership.</b></p>
<ul style="list-style-type: none"> <li>○ Create a diverse Conference Committee</li> </ul>
<ul style="list-style-type: none"> <li>○ Conduct 3-4 Webinars (with increased attendance based on expansion of webinar package)</li> </ul>
<ul style="list-style-type: none"> <li>○ The Communication and Outreach Committee will provide the Listserve as a service to the membership posting updates, information, and Jobs as submitted; and publish the blog monthly with information, reports, and resources that are timely and pertinent</li> </ul>
<ul style="list-style-type: none"> <li>○ Provide 2 Pre-Conference Workshops, including a Mid-Level Workshop</li> </ul>
<ul style="list-style-type: none"> <li>○ To have conference registration open in October 2017. Drawing for a getaway stay, donated by Hilton Mark Center, to SASFAA member who registers for the conference by December 1, 2017</li> </ul>
<ul style="list-style-type: none"> <li>○ To plan a conference that provides a premier training and networking opportunity for members of the Association</li> </ul>
<p><b>GOAL 11: Disseminate information to the membership and appropriate constituencies.</b></p>
<ul style="list-style-type: none"> <li>○ The Communications and Outreach Committee will follow the schedule for reporting to the membership as published in the P&amp;P on page 50, making substitutions as necessary</li> </ul>
<ul style="list-style-type: none"> <li>○ The Communications and Outreach committee will use the Association's P&amp;P for gathering and sharing data, and solicit suggestions for additional types of information as needed</li> </ul>
<p><b>GOAL 12: Develop a plan and policy for the use of social media.</b></p>
<ul style="list-style-type: none"> <li>○ The Communications and Outreach Committee will review means of communication, and the goals of the President and Board of Directors to determine the optimal approach for communicating to the membership</li> </ul>
<ul style="list-style-type: none"> <li>○ The Communications and Outreach Committee will assess current social media exposure and usage and recommend any changes that would improve communication and member access to information</li> </ul>
<p><b>GOAL 13: Foster collaborative training opportunities among member states, sister regional organizations and NASFAA.</b></p>
<ul style="list-style-type: none"> <li>○ Host a SASFAA Enrollment Management Forum (national trend, location using results of site selection survey)</li> </ul>
<ul style="list-style-type: none"> <li>○ Summer New Aid Officer Workshop Program Assessment</li> </ul>
<ul style="list-style-type: none"> <li>○ President Elect Regional Exchange with RMASFAA</li> </ul>

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<ul style="list-style-type: none"> <li>○ Host the 2018 New Aid Officer Workshop, increasing attendance if possible (using the results of the 2017 evaluation to shape the curriculum and schedule)</li> </ul>
<b>GOAL 15: Be fiscally prudent.</b>
<ul style="list-style-type: none"> <li>○ Develop and maintain a zero base budget and publish final budget to the membership</li> </ul>
<ul style="list-style-type: none"> <li>○ Review and update the Guide to Financial Management, including refinement of the Treasurer-Elect duties and incorporation of recommendations from the Cost Containment Task Force</li> </ul>
<ul style="list-style-type: none"> <li>○ Conduct the 2016-2017 financial review and a 2017-2018 quarterly review to ensure sound financial practices</li> </ul>
<ul style="list-style-type: none"> <li>○ Develop duties for the Treasurer-Elect</li> </ul>
<b>GOAL 16: Develop a 5-year financial plan</b>
<ul style="list-style-type: none"> <li>○ Develop a 5-year financial plan</li> </ul>
<ul style="list-style-type: none"> <li>○ Develop an investment policy and explore investment opportunities to grow the reserves</li> </ul>
<b>GOAL 17: Develop a Vendor/Sponsor Guide</b>
<ul style="list-style-type: none"> <li>○ Create a Sponsorship Guide for future use by Sponsorship Chairs</li> </ul>
<b>GOAL 18: Educate membership on legislative advocacy.</b>
<ul style="list-style-type: none"> <li>○ Review and update SASF<sup>AA</sup> Legislative Guide</li> </ul>
<ul style="list-style-type: none"> <li>○ Host a webinar for the membership on legislative advocacy prior to Hill Visits</li> </ul>
<ul style="list-style-type: none"> <li>○ Provide a Session on Legislative Advocacy during the annual conference</li> </ul>
<b>GOAL 19: Provide opportunities for legislative advocacy.</b>
<ul style="list-style-type: none"> <li>○ Provide regular updates on the SASF<sup>AA</sup> Nine News</li> </ul>
<ul style="list-style-type: none"> <li>○ Develop a SASF<sup>AA</sup> FLASH for urgent legislative issues</li> </ul>
<ul style="list-style-type: none"> <li>○ Provide membership with all facts one issues allowing them to make decisions that are important for their institution</li> </ul>
<b>GOAL 20: SASF<sup>AA</sup> should be an influencer in the legislative and regulatory process.</b>
<ul style="list-style-type: none"> <li>○ After committee review issues, provide membership with suggested language for letters</li> </ul>
<ul style="list-style-type: none"> <li>○ Write letters for the President to submit on behalf of the Association (if needed)</li> </ul>
<ul style="list-style-type: none"> <li>○ Keep membership apprised through Blog, Newsletter, and Emails</li> </ul>
<b>SASF<sup>AA</sup> President Goals</b>
<ul style="list-style-type: none"> <li>○ Increase the number of SASF<sup>AA</sup> members earning NASF<sup>AA</sup> credentials</li> </ul>
<ul style="list-style-type: none"> <li>○ Review and implement Cost Containment Task Force Recommendations</li> </ul>
<ul style="list-style-type: none"> <li>○ Increase the number of webinars and number of participants</li> </ul>
<ul style="list-style-type: none"> <li>○ Assess the New Aid Officers Workshop program</li> </ul>