

**AASFAA LONG-RANGE PLAN
2004-2009**

1. ORGANIZATIONAL STRUCTURE

EXECUTIVE BOARD

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

OBJECTIVE:

- 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:

- 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:

- Review the board retreat concept to facilitate transition of office between the outgoing and incoming board members.

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, that reflect 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 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 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 that 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:

- Review current membership categories, voting privileges and related issues for future planning.
- Evaluate membership categories and aggressively seek to increase membership in under-represented areas.
- 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 participation by new members.
- Promote continued involvement among all members.

2. OPERATIONS

BY-LAWS

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

OBJECTIVE:

- Bylaws will be reviewed annually 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:

- Establish a procedure to ensure that the policies and procedures are accurate and complete and that the Association is in compliance with these rules.

- Annually review the policies and procedures 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 AASFAA board.
- 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:

- Establish procedures to maintain records of the Association electronically.
- Periodically review the methods used to maintain records.
- 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.

OBJECTIVES:

- 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:

- Provide timely information useful to all sectors of the membership.
- Develop a Master Calendar each year.
- 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.
- Review current communication methods to the membership and aggressively pursue the use of technology as a routine avenue to conduct Association business.

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:

- Apprise members of legislative issues affecting the profession.
- Educate members of alternative approaches.
- Advocate timely, effective involvement on issues affecting the profession.
- Advocate positions when a reasonable consensus exists.

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:

- Increase use of web site by AASFAA's members.
- Increase use of electronic mail lists by AASFAA's members.
- 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.
- Encourage membership use of electronic communication technology with training and informational activities.

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 and professional development needs of members, recognizing distinctions among members such as experience, institutional type, and level of responsibility.
- Train members in other areas that directly or indirectly affect student aid, e.g., business office, enrollment issues, and computer technology.
- Evaluate the content of conferences and training efforts to ensure they provide current information and meet the needs of the membership.
- Provide diverse 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.

- Recognize and encourage the development of formal and informal “networking” strategies for sharing information and locating job opportunities.
- Recognize and provide opportunities for pre- and post- conference training activities.
- Encourage participation in professional development activities by experienced members who represent the diversity of the membership and are capable of motivating and teaching others.
- Provide training sites that are accessible to the membership and financially feasible.
- Provide special attention to new technologies as both an object of training efforts and as a vehicle for presenting training, discussion, and advancement.
- 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 AASF AA through careful and regular planning and evaluation.

OBJECTIVES:

- Annually determine the appropriateness of fees assessed for dues, professional conferences, training workshops, and sponsorship support.
- 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.
- Review annually, all risks and potential liabilities affecting cash management and contractual obligations to ensure Association bonding/coverage is sufficient.
- Outline parameters for developing the Association’s operating budget, ensuring that it is always balanced.
- 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.
- Conduct an annual review of the Association’s investment strategies to ensure solvency and growth of special program funds.

SCHOLARSHIP

GOAL: Ensure that the Association disseminates current information about the Legacy Scholarship Program.

OBJECTIVE:

- Develop a scholarship brochure that provides accurate information about each of the scholarship honorees.