

VASFAA

BOARD - COMMISSIONER - COMMITTEE PLANS & REPORT FORM

(Add additional objectives and status reports as needed)

Committee: Treasurer-Elect

Commissioner/Board Position: Zita Barree/Treasurer-Elect

Year (e.g., 2005-06): 2006-07

Committee Members: N/A

Standard Goal 1: Learn to perform the various duties of the Office of Treasurer to facilitate smooth transition to the position of Treasurer. (Strategic Plan Reference: Section 4.1 A (1) and 4.1 C (1))

Objective 1 (HOW the committee plans to achieve the stated goal):

Plan to meet with Kerrie Roth, VASFAA Treasurer, at least twice during the year in addition to the conference to learn the various functions of the job.

Status Reports of Objective 1 (Please report your progress toward achieving the stated goals – this is where the committee provides updates to the Board, including any suggestions or modifications to the goal and/or the Strategic Plan):

Date: 10/10/06

Report: I met with Kerrie at ODU on Friday, September 29 and we started reviewing the various functions of the Treasurer. We also visited Wachovia where Kerrie made the week's deposit. _____

Date: 1/29/07

Report: nothing new to report

Objective 2 (HOW the committee plans to achieve the stated goal): _____

Status Reports of Objective 2 (Please report your progress toward achieving the stated goals – this is where the committee provides updates to the Board, including any suggestions or modifications to the goal and/or the Strategic Plan):

Date: _____

Report: _____

Date: _____

Report: _____

Date: _____

Report: _____

BUDGET

Item *(Broad general categories)*

Cost

Board Approved Amount: \$ _____

Date: _____

(Use separate sheet if necessary.)