

## VASFAA

### **BOARD - COMMISSIONER - COMMITTEE PLANS & REPORT FORM**

(Add additional objectives and status reports as needed)

**Committee:** President

**Commissioner/Board Position:** Patricia Kelly/President

**Year (e.g., 2005-06):** 2007-08

**Committee Members:**

N/A

**Standard Goal 1:** Promote VASFAA's Vision, Mission and Purposes. (Strategic Plan Reference: Section 1.0, 2.0, and 3.0)

**Objective 1** (*HOW the committee plans to achieve the stated goal*): Communicate with VASFAA members throughout the year via listserv, newsletter articles, phone calls, meetings, e-mails, in person, and other appropriate method (including possible 'away missions' in regional areas) to meet this goal.

**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:** 6/11/07

**Report:** Even before the Board retreat at William and Mary's Conference Center June 11, I was talking to the incoming Board and Committee Chairs about my vision and concerns. My articles for the Voice will be informative and address today's issues. I have tried to communicate clearly and simply about VASFAA goals and objectives. The year needs to be successful even in spite of the uncertainty in the student loan industry. The committee chairs discussed and set goals and objectives using ATAC as a reporting device to the membership. The committees will follow through with the activities and come through the year successfully. Items will be posted to the VASFAA listserv as they occur. A summary of SASFAA board reports and any articles of interest will be submitted to the Summer and subsequent issues of the VASFAA Voice. Several individual conversations with committee chairs and their commissioners focusing on association-related business will enhance the communication needed to have a successful year. An article regarding my goals and objectives for the committees will appear in the Voice for members' understanding of this year's unique challenges in running this association.

**Date:** 8/10/07

**Report:** Our first board meeting by teleconference occurred on August 10<sup>th</sup> and that worked quite successfully for a board meeting with a limited agenda. We discussed the Vendor/Sponsor policy, National Training for Counselors and Access, and planned the date for the fall Board meeting in Richmond. I am preparing articles for VASFAA Voice and the SASFAA Newsletters. It is so important to spread the news of our successes to our neighboring associations and to our members. Regular communications are on-going with board members and committee chairs via e-mail and phone calls. We ascertained our IRS status as 501(c)6. Next board meeting scheduled for November 7 at the Ginter House/VCU.

**Date:** 11/07/07

**Report:** We had a full board meeting at VCU using our limited budget economically for lunches. We addressed committee reports and are carrying out very successful fall trainings through Support Staff. I am

always ready to write an article for either the VASFA Voice or SASFAA. Much business was conveyed with our chief concern being "budget". Another Board meeting will be held at the Hotel Roanoke in Late January. This will be a site visit for the Conference in 2009. Membership needs to know that we are again looking at total cost and that the Hotel is working with Michael Poma, 2009's conference chair, on providing VASFAA with a conference we can afford.

**Objective 2** (*HOW the committee plans to achieve the stated goal*): Represent VASFAA on the SASFAA Executive Board. (Also attend NASFAA)

**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:** 6/6/07 \_\_\_\_\_

**Report:** I attended the June SASFAA Transition Retreat and July 27 SASFAA Executive Board Meeting. The transition meeting was overwhelming. Being president of a state association is nothing compared to managing and leading a regional association representing 9 southern states. At the July board meeting, many items were addressed, including approving a balanced budget for SASFAA. Budgets are the buzz word this year and many are wondering if and how spending will turn out. With The Conflict of Interest statements circulating at state, regional, national, and institutional levels, we have all been well-educated on what is considered acceptable and unacceptable in receiving funds from lenders. Opportunities abounded in discussions with the other SASFAA State Presidents about their associations and we discussed issues that were common to each of our state associations. Much of this information was passed on via newsletter to members. I will be attending the NASFAA conference in Washington, DC. The other SASFAA presidents will be there and we can learn and obtain input from the rest of the nation regarding the issues and concerns abounding currently.

**Date:** 11//2/07 \_\_\_\_\_

**Report:** The SASFAA State Presidents are very active as a group. We share so much information and have so much to discuss commonly. Again, the topic is "budget" and how we are seeing our way through the year of all years. Business goes on in SASFAA regardless as we must meet our mission's goals and objectives. I was able to visit the Florida fall conference in the Florida Panhandle (Sandestin) in October. I was first state president to do the visits through SASFAA's interstate-visitation program. The conference fee was waived and I was treated to SASFAA's hospitality. It was a great way to meet the membership in our southern most state. I am trying to keep the VASFAA membership aware of what this job entails through articles in the Voice.

**Date:** 2/29/2008 \_\_\_\_\_

**Report:** I attended the SASFAA Conference in Crystal City on 2/16-20. The Executive Board met right before and transacted business. Virginia hosted the conference and I was able to do the warm welcome that I had hoped to do. I am continuing to work with SASFAA board and will keep the VASFAA board and VASFAA membership apprised of goings on in SASFAA and NASFAA. Many VASFAA members turned out for the SASFAA conference and represented this state well. Erik Melis was voted in as Vice President and Brad Barnett as Secretary for 2008-09.

**Objective 3** (*HOW the committee plans to achieve the stated goal*): Work to increase enhance interactions between VASFAA and external entities (e.g. legislators, state agencies, VCAN, other aid associations, etc.).

**Status Reports of Objective 3** (*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:** 12/11/07 \_\_\_\_\_

**Report:** As the previous presidents have done, I also attended VCAN in Newport News in early December. They had excellent presenters and it was very nice to see that the assistance that we provide for needy

students, really makes the access to higher education possible. Several VASFAA folk represented the association there. Many access counselors are also members of VASFAA. Our missions are inter-related and the two associations can become better in developing a partnership between VASFAA and VCAN. Again, planning articles for VASFAA and SASFAA are the main ways I plan on communicating with the membership regarding the information I receive.

**Standard Goal 2:** Lead the Association by providing opportunities for professional educational growth for the membership and awareness of financial aid awareness opportunities for students. (Strategic Plan Reference: Section 1.0, 2.0, 4.1 A (3), and 4.5 A (1-4))

**Objective 1** *(HOW the committee plans to achieve the stated goal):* Work with appropriate VASFAA committees to ensure quality professional development opportunities are afforded to the membership.

**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:** 8/3/07

**Report:** I met with the conference committee co-chairs planning for the May 18-21, 2008, annual conference. The contract was recently signed and was signed late because of uncertainty about what to do with cost. The contract is giving us what we need but the cost of carrying out our objectives, in light of these unstable times, is unnerving.

**Date:** 10/15/2007

**Report:** Unlike last year, the Conference Committee is looking into consolidating its offerings in training to the membership. Funding is being reviewed as it will only stretch so far. It appears that the Experienced Aid Officers' Workshop which is scheduled to be held in Fredericksburg, is being cancelled this year. Much planning has already been done by Katherine Lister and her committee assistants. It may be best if the funding go to the conference in the spring. With this year's tight funding, it may be that the Support training and New Aid Officer training are as much as the association can handle this year.

**Date:** 1/29/2008

**Report:** It appears that many lenders are leaving the student loan area and with it, many of our lender volunteers are not able to carrythrough with their volunteer efforts. Times are definitely not what they were last year. Our big training/volunteer effort is coming up in Awareness activities on 2/16 and 23. SASFAA's annual conference is starting that weekend and the concern is that many will be involved in SASFAA. Hopefully many members who do not attend SASFAA will be able to assist in the handling of Awareness and Super Saturday. We had wonderful Secondary School Training back in November and December. I would think that the high school guidance counselors would encourage their students to attend our Awareness activities and would encourage our members to participate. Awareness is so natural as it is a part of our everyday jobs as Financial Aid Administrators and Counselors.

**Objective 2** *(HOW the committee plans to achieve the stated goal):* Communicate with the Executive Board and committee chairs to identify future leaders of the association.

**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:** 6/11/07

**Report:** I followed Erik's lead in establishing co-chairs heading up committees. It allows more volunteers to take a lead in the committee action and makes visions of leadership more optimal for our members. Many of

chairs are working as first-time chairs. Having two co-chairs also increases the chances of success in the committee, especially during this troubled financial time in our history. We again had a large pool of volunteers to draw from for committee assignments which was very encouraging since many of those volunteers were new to VASFAA

**Date:** 11/7/08\_\_\_\_\_

**Report:** I am working with the President-Elect in preparation for her term as President for 2008-09 and to discuss options for conference sites for 2009. After this year's laborious and lengthy study of the Marriott City Center, I feel we have become professional conference planners. I continue to watch and remark on the talent this association has through its members. The financial aid personnel are pushed to extrmes in their jobs but they continue to show me that they love this profession and are ready to volunteer for VASFAA! That is so heart-warming. It will be difficult to reward so many with so little finances Thank you is all I think we can do this year.

**Date:** 1/29/2007\_\_\_\_\_

**Report:** Slate of candidates for the 2008 election is partly finalized as we look for a person to run for President Elect. Perhaps one of our representatives-at-large is ready for the position? Many have thrown their hats in the ring for Treasurer Elect and Reps-at-large.It appears that when the full slate is accepted, VASFAA will have some good leaders stepping up to the plate. Our Newsletter will feature the conference and those running in May. Our conference committee leadership is doing great things with so little funding. Leave it to our creativity to get the job done. For this, I am grateful to our volunteers who come forward and look to lead VASFAA in many wonderful ways!

**BUDGET**

<u>Item</u> (Broad general categories)	<u>Cost</u>
Primarily for VASFAA, SASFAA, and NASFAA activities and end of conference, nominal appreciation gestures.	\$4,400
Additional FASFAA travel included this year.	
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**Board Approved Amount:** \$4,400\_\_\_\_\_

**Date:** 5/16/2007\_\_\_\_\_

(Use separate sheet if necessary)