

**Georgia Association of Student Financial Aid Administrators, Inc.
(GASFAA)**

**Strategic Plan
2001-2006**

The Georgia Association of Student Financial Aid Administrators, Inc. (GASFAA) was established in 1967 with the primary purpose of providing a common ground for institutional aid administrators and others who are involved in assisting students who are applying for receiving student financial aid. Long-range planning is a critical component of GASFAA's mission. Without a plan for where the Association wants to go there is no way to know if we are making progress toward reaching our destination.

In the 1999-2000 year, President Deborah Clark named Ron Day (Reinhardt College) to chair the Strategic Long-Range Planning Committee. Jennifer Heter (SunTrust Education Loans), Susan Little (University of Georgia), Gary Mann (DeKalb Technical Institute and GASFAA president-elect), Marie Mons (Georgia Tech), and Charlene Morgan (Middle Georgia College) were named to the committee. A membership survey was devised and mailed to all members in the spring of 2000. Results were tabulated and distributed at the Spring Meeting.

Due to a move out-of-state by Ron Day, in the 2000-01 year Susan Little was asked to become the committee chair and new members Patrick Bonones (Oglethorpe University), Darrell Jackson (Gwinnett Technical Institute), Nosakhere K. Kamau (Emory University), Lisa Mitchem (Georgia Tech and GASFAA president-elect, replacing Gary Mann), joined the committee. The committee met in November 2000 and formulated a draft of the Strategic Long-Range Plan and Mission Statement, which was presented to the Executive Board on January 19, 2001 for revision and comments.

MISSION STATEMENT

The Georgia Association of Student Financial Aid Administrators endeavors to provide professional contacts as the major means of meeting the Goals set forth in the Strategic Long-Range Plan. Professional growth of Association member is necessary to ethically and adequately assist the students for whom we work. Emphasis will be placed on encouraging educational programs, which are devoted to assisting students and their families in the process of financing education. Innovative and technologically sound principles will be utilized, while giving particular attention given to the fiscal viability of the Association.

STRATEGIC LONG RANGE PLAN

Conferences

Goal: GASFAA conferences should continue to address the needs of all members while presenting timely training and networking opportunities to all participants.

Objective: Emphasis should be placed on enhancing the content of the fall meeting.

Objective: A review should be made of the timing of the fall conference to avoid conflict with registration times for each sector of our membership.

2002 Efforts should be made early in the GASFAA year to obtain a calendar of registration times and other important dates to insure that schools on the semester and quarter systems are able to attend the meetings.

Objective: The site of the fall meeting should continue to be rotated around the state to allow more of our members to attend.

2002 The fall meeting was held in Macon which provided equal access to the location from anywhere in the state for the 299 attendees.

2002 Plans are underway for the Fall 2003 meeting to be held in a new location to allow for geographic access to all members.

Objective: Consideration should be given to designating a local school or schools as the “host” school to assist with the fall meeting to provide local support for the conference committee and provide possible speakers for the conference.

2002 This could be considered in an area where a large or very active school was located but could be a problem in less populated areas of the state.

Objective: Attention should be given to containing costs of the conferences in order to keep the registration fees as low as possible to increase participation by the membership.

2002 The conference fees this year were determined to be the amounts necessary to cover the expenses of the conferences.

Objective: GASFAA should play a major role in all pre-conference events to insure that GASFAA is the main reason for attending and other events are enhancements.

Objective: Conference planning should recognize the on-going needs of the various sectors of GASFAA membership and plan interest sessions to meet those needs.

2002 Fall conference included issues related to customer service and cultural diversity as well as traditional financial aid issues.

Finances

Goal: Adequate financial records must be maintained to document the financial status of the association with regular updates to the membership.

Objective: Financial reports should be provided in each issue of the newsletter and provided at the spring and Fall meetings.

2002 The treasurer did an excellent job of providing timely and up-to-date reports as required.

Goal: The GASFAA Board should develop a plan to maintain future growth of the GASFAA reserve fund.

2002 In addition to insuring future growth of the reserve fund, efforts should be made to educate the membership on the reason for the reserve and what the target reserve amount is. This should be shared with the membership on an annual basis.

Objective: The Board should devise a plan for transferring funds at the end of the year into an investment instrument for the reserve fund.

Objective: An annual review of the monies set aside in any reserve fund should be made to determine if the amount designated is reasonable. A three-year review of the use of any reserve funds should also be made.

Objective: All GASFAA events should be determined by both financial and quality concerns, balancing the need for fiscal responsibility against the need for quality programming.

Governance and By-Laws

Goal: Members should be educated about GASFAA governance and By-Laws.

Objective: The secretary will submit an article in each newsletter discussing a section of the by-laws.

2002 Attention should be given to meeting this objective in the coming year.

2002 An effort should be considered to publicize the GASFAA, Inc. By-Laws on the Web site so that members have ready access to them.

Objective: The Board should review the terms of office and criteria for election for all officers prior to updating the five-year Strategic Long-Range Plan.

History

Goal: A plan for gathering copies of all conferences programs and registration materials for GASFAA sponsored events should be devised. This would include pictures of the meeting and materials from our first year should be solicited.

2002 This secretary should be considered to be named the designated officer to send copies of all committee reports, minutes and conference materials to be held with other historical data, which is housed at the University of Georgia.

Objective: Displays should be provided at spring meetings to show pictures and information from past meetings.

Objective: An effort should be made to develop a comprehensive list of all past GASFAA officers and committee chairs to be displayed on the Web.

2002 This should be updated each year and posted to the Web as a regular part of the secretary's responsibilities.

Objective: An effort should be made to obtain copies of past newsletters to provide information on years for which we have no files.

Legislative Action

Goal: The Legislative Action Committee should continue to be a viable part of the GASFAA organization and continue to address pertinent issues.

2002 As we approach the Reauthorization process this should become a high priority of the Association.

Objective: The membership should be informed of changes, regulations and issues as they relate to student financial aid at both the state and national levels.

Objective: Efforts should be made to better inform state legislators on issues which relate to student financial aid.

2002 Private schools have GFIC, which promotes their legislative interests; GASFAA should consider becoming more involved in all sector issues, private, public, and DTAE and disseminate information as needed to legislators.

Lender/Vendor Relations

Goal: GASFAA should work to insure that a mutually beneficial relationship exists between the Association and lenders/vendors and other involved agencies.

2002 Lenders were found as active participants in all areas of GASFAA life this year – on the Board committees, displaying at conferences and donating door prizes.

Objective: Efforts should be made at every GASFAA function to insure that appropriate display space, recognition and support is provided to our lenders and vendors.

2002 A luncheon in honor of our vendors/sponsors was very well received at this year's spring conference.

Membership

Goal: GASFAA dues should be set at an amount, which will help to maintain the financial position of the Association while not burdening the membership

Objective: A current review should be made of other SASFAA state associations' fee and membership structures.

Objective: The membership should be educated on what our GASFAA membership dues provide.

2002 Publicity on our Web site and Newsletter would be helpful in this area.

Policies and Procedures

Goal: The GASFAA Policy and Procedure Manual should be reviewed on an annual basis.

2002 This review was done and will be made available on the Web site.

Objective: A current copy of the Policy and Procedure Manual should be made available to the membership on the GASFAA Web site.

Objective: Each Board member should provide at the end of his/her term an up-to-date time line of activities during the past year. These are to be given to the incoming Board members. The GASFAA secretary will be responsible for collecting these and attaching them to the Policies and Procedures Manual as an addendum.

Publications and Communications

Goal: GASFAA should continue to provide to all paid members an annual membership directory and quarterly newsletters.

Objective: GASFAA should investigate moving the membership directory and/or newsletter to a Web based or other electronic environment only. This will involve educating the membership to the advantages of a Web or CD application.

2002 Work has begun to study this issue but no action has been taken yet.

Objective: Consideration should be given to outsourcing the maintenance of the Web based directory if it should become a reality.

Objective: Issues that are of current interest to members should be given special consideration when utilizing technological avenues for communication.

Objective: All officers and committee chairs should use the GASFAA list serve for communication with the membership.

2002 The GASFAA Grapevine, List-serv, Web site and the membership directory have been utilized in the past year to communicate information to the general membership regarding the GASFAA organization, updates related to changes in financial aid, membership information and conference highlights.

Scholarships:

Goal: The Association should educate the membership about the Memorial Scholarship fund and facilitate fund raising for this fund.

2002 The GASFAA Web site was updated to include the names of those being memorialized by GASFAA.

Objective: The Past President's should plan fundraising and ways to educate the membership about this scholarship fund. Care should be taken to insure that any fund raising activities fit in with conference plans and have Board approval.

2002 The past presidents have assumed responsibility for fund raising for the Memorial Scholarship Fund. Rattles tickets were sold at each meeting and all proceeds were dedicated to this fund.

Strategic Planning

Goal: GASFAA should maintain an ongoing five-year plan to guide the growth of the association.

Objective: An Annual review and written to the Board by the Strategic Planning Committee should occur each spring.

2002 This review was accomplished by Deborah Barbone, North Georgia State College and University, Susan Little, University of Georgia. Charlene Morgan, Middle Georgia College, and Julia Perreault, Emory University. It will be submitted to the Board for planning purposes for the incoming Board.

Objective: The Plan should be reviewed by the Board at the beginning of each fiscal year for planning purposes.

Training and Professional Development

Goal: One of GASFAA's major goals should be to offer high quality training and professional development activities for all members.

2002 The Professional Development Committee provided several workshops to address the needs of all members by planning and organizing the Support Staff Workshop, providing professional staff an opportunity to participate in workshop for developing a Policy and Procedure Manual. In addition to these events, the Professional Development Committee has initiated outreach activities designed to target high school students and counselors with financial aid information. Also, members of the Professional Development Committee took part in Probe Fairs around the state.

Objective: GASFAA should work to meet the training needs of all levels of OSFA employees, new, support, managerial, etc. Topics listed on the recent membership survey should be utilized where practical.

2002 It is recognized that some training opportunities offered by other associations (regional and national) are the best available and GASFAA should make every effort to publicize those when practical.

Objective: Training should be held in locations around the state to increase access by members, with cost also being a major consideration.

Objective: GASFAA should strive to be the liaison for disseminating information from all student financial aid sources to the membership.

Objective: Attention should be given to providing training on technological issues of importance to aid offices. The Job requirements and roles of upper level management and support staff will be changing as technology advances and GASFAA should be aware of this in offering training.

Revised February 3, 2003