



Introduction to SWASFAA

The Southwest Association of Student Financial Aid Administrators is an organization dedicated to promoting the professional preparation, effectiveness, training, recognition and association of student financial aid administrators within the five state region of the southwest, which includes Arkansas, Louisiana, New Mexico, Oklahoma, and Texas. We exist to serve the interests and needs of students, educational institutions, government agencies, foundations, and private and community organizations to promote and develop effective programs for student financial aid.

Our Mission

Enhance the professional development of financial aid administrators

Our Core Values

Professional Growth and Development

Collaboration

Inclusiveness

Advocacy

Integrity and Ethics

Leadership

Access and Equity

**Southwest Association of Student Financial Aid Administrators (SWASFAA)
Long Range Plan 2016-2020**

Goal 1 -- Association Administration/Organizational Structure -- Maintain the long-term operation of the association

Measures/Success Criterion/Metrics

- * The By-laws and Policies and Procedures Manual are complete and guiding the association
- * Committees complete assigned tasks as supported through annual reports
 - * A full slate of officers is presented and elected annually
- * Association members will participate in association sponsored events

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Objective 1.1. Ensure that the association's governing documents support the vision, purpose and viability of the association.

Action Steps	Responsible Committee, Officer, Board Member	2016	2017	2018	2019	2020
Review by-laws and policies and procedures manual annually to ensure they continue to further the mission and vision of the association and reflect recent board action.	President and President-Elect	X	X	X	X	X
Review the charge of all committees annually to support the goals of the association.	President, Board of Directors and Committee Chairs	X	X	X	X	X
Review the association's Long Range Plan (LRP) annually for relevance and update the LRP at least once every five years.	President, Board of Directors and Committee Chairs	X	X	X	X	X
Create action steps to reach Long Range Plan by 2020.	President, Board of Directors and Committee Chairs					X

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Objective 1.2: The membership of the association should represent the composition of financial aid professionals in the region.

Action Steps	Responsible Committee, Officer, Board Member	2016	2017	2018	2019	2020
Develop plan to increase membership	Membership Committee	X	X	X	X	X
Review membership categories at least every three years to ensure relevance.	Membership Committee and Board of Directors			X		
Monitor the persistence rates of membership and analyze the reasons for discontinuing membership.	Membership Committee	X	X	X	X	X
Target specific populations from each state to increase membership through email and/or other forms of communication.	Membership Committee	X	X	X	X	X

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Objective 1.3: Provide association-specific training for new officers, board members and committee chairs.

Action Steps	Responsible Committee, Officer, Board Member	2016	2017	2018	2019	2020
Provide training for new officers, board members and committee either immediately prior to new year or at the start of each new year (new President-Elect will determine training time).	President-Elect	X	X	X	X	X
Upon election or appointment to office, the President should provide links to or copies of the Policy and Procedure Manual, By-laws, association budget information, and the Long Range Plan that describes the expectations for various roles of the association.	President	X	X	X	X	X

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Objective 1.4: Maintain historical association records.

Action Steps	Responsible Committee, Officer, Board Member	2016	2017	2018	2019	2020
Maintain the association's historical records.	Archives Committee and Secretary	X	X	X	X	X
Maintain digital storage capability for all archive information.	Archives Committee and Secretary	X	X	X	X	X

**Southwest Association of Student Financial Aid Administrators (SWASFAA)
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Objective 1.5: Legislative advocacy

Action Steps	Responsible Committee, Officer, Board Member	2016	2017	2018	2019	2020
Monitor legislative activities relating to financial aid administration	President, President-Elect, Immediate Past President and Legislative Issues Committee	X	X	X	X	X
Provide timely information to the membership concerning legislative activities particularly on the federal level.	President, President-Elect, Immediate Past President and Legislative Issues Committee	X	X	X	X	X
Respond as an association to proposed legislation as appropriate	President, President-Elect, Immediate Past President and Legislative Issues Committee	X	X	X	X	X

**Southwest Association of Student Financial Aid Administrators (SWASFAA)
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Goal 2 -- Training/Professional Development -- Provide training, workshops, and professional development opportunities that are responsive to the needs of the membership

Measures/Success Criterion/Metrics

- * Program/Session evaluations reflect excellent approval rating
- * Appropriate attendance at events to ensure value to the membership and fiscal viability to the association
 - * Selection of training site allows maximum participation

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Objective 2.1: Ensure the Annual Conference is of high quality and relevance to the membership

Action Steps	Responsible Committee, Officer, Board Member	2016	2017	2018	2019	2020
Provide a varied agenda at each annual conference	Annual Conference Committee	X	X	X	X	X
Evaluate the need and provide opportunities for targeted pre-conference professional development opportunities as appropriate	Annual Conference Committee	X	X	X	X	X
Annually review evaluations from previous conference as a tool in conference development	Annual Conference Committee	X	X	X	X	X

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Objective 2.2: Provide for training opportunities as appropriate

Action Steps	Responsible Committee, Officer, Board Member	2016	2017	2018	2019	2020
Evaluate possible training locations and formats to reduce cost for members	Training Committee, Leadership Development Committee and Mid Level Committee	X	X	X	X	X
Develop training plan	Training Committee, Leadership Development Committee and Mid Level Committee	X	X	X	X	X
Annually evaluate training plan to enhance current and create new training opportunities for the membership	Training Committee, Leadership Development Committee and Mid Level Committee	X	X	X	X	X

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Objective 2.3: Develop and conduct annual Boot Camp for new/novice aid officers

Action Steps	Responsible Committee, Officer, Board Member	2016	2017	2018	2019	2020
Evaluate and enhance topics so that they are targeted to financial aid officers with less than two years of experience	Boot Camp Committee	X	X	X	X	X
Develop and provide resource information for attendees	Boot Camp Committee	X	X	X	X	X
Creating networking and/or mentoring opportunities for participants	Boot Camp Committee	X	X	X	X	X

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Goal 3 -- Communication -- Facilitate and enhance communication among the membership

Measures/Success Criterion/Metrics

- * Updates to website will be made and announced via listserv in a timely manner
 - * Use of listserv for topics requiring quick response
- * Different forms of communication are utilized by membership (social media, blogs, emails)

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Objective 3.1: Maintain and enhance Association email listserv

Action Steps	Responsible Committee, Officer, Board Member	2016	2017	2018	2019	2020
Develop and maintain a regional database that includes 100% of the member institutions in the region	Membership Committee and Electronic Initiatives Committee	X	X	X	X	X
Send institutional information to the membership to update database annually	Membership Committee	X	X	X	X	X
Develop and enhance SWASFAA Facebook page, including building membership excitement and opportunities for communication and collaboration	Electronic Initiatives Committee, President, Board of Directors and Committee Chairs	X	X	X	X	X
Utilize social media outlets	Electronic Initiatives Committee, Board of Directors and Committee Chairs	X	X	X	X	X
Utilize SWASFAA Blog	Electronic Initiatives Committee, President, Board of Directors and Committee Chairs	X	X	X	X	X

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Objective 3.2: Maintain and enhance Association website

Action Steps	Responsible Committee, Officer, Board Member	2016	2017	2018	2019	2020
Create and maintain a calendar listing of conferences related to the needs of the membership	Electronic Initiatives Committee, President, Board of Directors and Committee Chairs	X	X	X	X	X
Survey the membership to ensure that the website meets their needs at least once every two years	Electronic Initiatives Committee	X		X		X
Change website based on survey	Electronic Initiatives Committee and Board of Directors		X		X	
Review contract with the host site at least once every three years	Electronic Initiatives Committee, President and Treasurer	X			X	
Advertise training opportunities to enhance attendance	Electronic Initiatives Committee	X	X	X	X	X
Ensure that the website is quick reference for members	Electronic Initiatives Committee	X	X	X	X	X
Annually enhance and maintain the committee information on the website	Electronic Initiatives Committee, President and All Committee Chairs	X	X	X	X	X

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Goal 4 -- Leadership Development, Training and Recognition -- Members who possess leadership skills and aspirations will be identified and developed for significant involvement within the association

Measures/Success Criterion/Metrics

- * Evaluations for development activities will reflect excellent approval rating
- * Additional opportunities for training and professional development are provided to the membership
 - * Increase in involvement and participation across the Association

**Southwest Association of Student Financial Aid Administrators (SWASFAA)
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Objective 4.1: Announce and support the SWASFAA awards

Action Steps	Responsible Committee, Officer, Board Member	2016	2017	2018	2019	2020
Review association award policies at least every five years to ensure they meet the needs of the association	Awards Committee and Board of Directors					X
Solicit nominees based on the criteria for the various awards outlined in the Policies and Procedures Manual	Awards Committee	X	X	X	X	X
Present awards at the annual conference or other appropriate time	Awards Committee	X	X	X	X	X
Provide opportunities for awardees to be assigned to committees or other roles as appropriate	Board of Directors	X	X	X	X	X

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Objective 4.2: Provide leadership training opportunities to increase the number of individuals ready to serve the association in leadership roles

Action Steps	Responsible Committee, Officer, Board Member	2016	2017	2018	2019	2020
Host a workshop for potential committee chairs, committee members, and other interested parties (at annual conference)	President-Elect	X	X	X	X	X
Provide opportunities for participants to be assigned to committees	Board and Committee Chairs	X	X	X	X	X
Develop and implement leadership training opportunities for those who have been identified as emerging leaders	Leadership Development Committee and Board of Directors	X	X	X	X	X

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Goal 5 -- Finances -- Secure and enhance the financial condition of the Association through careful and regular planning and evaluation

Measures/Success Criterion/Metrics

- * Seek to increase the eligible institutions in the region that are Association members by 2020
- * Association products and services should be self-sustaining

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Objective 5.1: Maintain revenue through membership dues

Action Steps	Responsible Committee, Officer, Board Member	2016	2017	2018	2019	2020
Monitor the persistence rates of membership and analyze the reasons for discontinuing membership	Membership Committee and Board of Directors	X	X	X	X	X
Periodically survey association members to determine if the Association is meeting their needs (every two years)	Membership Committee and President	X		X		X

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Objective 5.2: Create and maintain a realistic annual budget

Action Steps	Responsible Committee, Officer, Board Member	2016	2017	2018	2019	2020
Review the corporate sponsorship policies in the Policies and Procedures manually annually for appropriateness	Board of Directors and Committee Chairs	X	X	X	X	X
Incorporate the financial impact of corporate sponsorship in the budget planning process	President-Elect, Treasurer, Corporate Relations Committee	X	X	X	X	X
Review committee and board expenditures annually to ensure adherence to the budget and that the goals of the association are met	President, President-Elect, Treasurer, Committee Chairs	X	X	X	X	X
Review membership fees and determine appropriate changes based on additional services and/or products provided	Board of Directors and Committee Chairs	X	X	X	X	X

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Objective 5.3: Maintain sufficient reserve funds

Action Steps	Responsible Committee, Officer, Board Member	2016	2017	2018	2019	2020
Achieve and maintain a reserve ratio in accordance with the investment policies outlined in the Policies and Procedures Manual	President, President Elect, Treasurer, Finance Chair	X	X	X	X	X
Monitor, review, and revise as necessary the association's investment strategies for positioning the association's finances	President, President Elect, Treasurer, Finance Chair	X	X	X	X	X

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Goal Summary Chart					
	Goal 1	Goal 2	Goal 3	Goal 4	Goal 5
Officers					
President	1.1, 1.2, 1.3, 1.5		All	All	All
President Elect	1.1, 1.2, 1.3, 1.5		All	All	5.1, 5.2
Secretary	1.1, 1.2, 1.4		All	All	5.1, 5.2
Treasurer	1.1, 1.2		All	All	All
Immediate Past President	1.1, 1.2, 1.5		All	All	5.1, 5.2
State Presidents	1.1, 1.2		All	All	5.1, 5.2
State Delegates-at-Large	1.1, 1.2		All	All	5.1, 5.2
Standing Committees					
Annual Conference	1.1, 1.2	2.1	All	All	5.1, 5.2
Boot Camp	1.1, 1.2	2.3	All	All	5.1, 5.2
Finance	1.1, 1.2		All	All	All
Membership	1.1, 1.2		All	All	5.1, 5.2
Nominations and Elections	1.1, 1.2		All	All	5.1, 5.2
Other Committees					
Archives	1.1, 1.2, 1.4		All	All	5.1, 5.2
Awards	1.1, 1.2		All	All	5.1, 5.2
Corporate Relations	1.1, 1.2		All	All	5.1, 5.2
Electronic Initiatives	1.1, 1.2		All	All	5.1, 5.2
Leadership Development	1.1, 1.2	2.2	All	All	5.1, 5.2
Legislative Issues	1.1, 1.2, 1.5		All	All	5.1, 5.2
Local Arrangements	1.1, 1.2		All	All	5.1, 5.2
Long Range Planning	1.1, 1.2		All	All	5.1, 5.2
Mid Level	1.1, 1.2	2.2	All	All	5.1, 5.2
Site Selection	1.1, 1.2		All	All	5.1, 5.2
Training	1.1, 1.2	2.2	All	All	5.1, 5.2