



Washington Financial Aid Association

Executive Council Meeting

Officer/Committee Report Template

Save the completed report using the following format: WFAA.MeetingName.Date.CommitteeName.doc.
 Submit your report via email to the WFAA Executive Council listserv no less than 4 days prior to meeting.

WFAA Quarterly Officer/Committee Report	
Executive Council Meeting Date	10/22/2019
Officer/Committee Information	
Office Held/Committee Name:	President
Officer/Committee Chair:	Sarah Everitt
Officer/Committee Goals for Service Year	
Strategic Plan Goals that are being met (<i>check all that apply</i>)	
Goal 1: Be a leader in providing training and professional development opportunities that are responsive to member needs	<input checked="" type="checkbox"/>
Goal 2: Maintain the long-term financial stability of the Association	<input checked="" type="checkbox"/>
Goal 3: Assess and monitor the performance of the Association and implement strategic Adjustments	<input checked="" type="checkbox"/>
Goal 4: Increase member participation in Association activities	<input checked="" type="checkbox"/>
Goal 5: Continually improve methods and processes for communicating with the membership	<input checked="" type="checkbox"/>
Goal 6: Consolidate and communicate the public policy positions of financial aid administrators in Washington State and provide members with support and education to further their own advocacy efforts	<input checked="" type="checkbox"/>
Goal 7: Maintain and enhance the diversity of our membership and the Executive Committee	<input checked="" type="checkbox"/>
Goal 8: Collaborate and coordinate with other organizations and associations in order to serve our members more efficiently and effectively	<input checked="" type="checkbox"/>
Specific Officer/Committee Goals (<i>Include progress toward goals and measurement of success.</i>)	<ol style="list-style-type: none"> 1. Assist in the planning and execution of WFAA Conference 2. Confer with council to develop goals for upcoming year 3. Select WFAA non-elected executive council positions



Washington Financial Aid Association

Executive Council Meeting

Officer/Committee Report Template

WFAA Quarterly Officer/Committee Report

Summary of Activities *(Descending Chronological)*

10/15 – correspond with VP for Ethnic Awareness chair on protocol for issuing scholarships
 10/14 – Investment planning training
 10/9 – add vendor ads Whova app for conference
 10/4 – recruit sector meeting representatives
 9/29-10/3 – review and vote on Internal Audit procedures
 9/29 – prepare agenda, send call for reports for 10/22 meeting; research where student budgets committee chair left off
 9/26 – correspond with past council members to gather history
 9/25 – email PNACAC with information about WFAA conference,
 9/24-10/7 – write, research, and send information about institutional membership pricing option
 9/16 – introduce president-elect to WASFAA
 9/11 – go to Chase to get banking access
 9/4-10/18 conference planning, assistance, facilitating WASFAA training, troubleshoot registration issues, promote event, vendor recruitment, sign contracts, other logistics
 8/21 – submit WASFAA newsletter article
 8/20 – reach out to PLU to see if they will host WASFAA training event
 8/10-27 – work with conference chair and electronic services chair to get conference registration open
 8/9 – Onboard new VP Ethnic Awareness
 8/7 – call with conference co-chairs re: planning
 8/5 - 10 Facilitate budget discussion and approval
 8/5 – Work with WASFAA Training Committee to plan Washington events

Budget Information

Approved Budget	
Budget Expenditures to Date	771.80 (5x flights to transition meeting)
Event Information <i>(complete if applicable)</i>	
Event Name	Transition Meeting
Location	Gonzaga University & Ruby River Inn (Spokane WA)
Date	May 29-30, 2019
Event Name	
Location	
Date	



Washington Financial Aid Association

Executive Council Meeting

Officer/Committee Report Template

WFAA Quarterly Officer/Committee Report			
Attendees			
Complimentary Registrations (<i>if applicable – i.e., scholarship recipients</i>)			
Add more rows as needed for additional events.			
Suggestions for Future Officer/Committee			
President on Conference Committee			
Calendar of Events/Timelines			
Date	Committee Member Responsible	Description	