



Washington Financial Aid Association

Executive Council Meeting

Officer/Committee Report Template

Save the completed report using the following format: **WFAA Annual Conference Business Mtg. 10/22/19 FiscalPlanning.doc**. Submit your report via email to the WFAA Executive Council and post your report to the WFAA website's Meeting Minutes Index no less than 4 days prior to meeting.

WFAA Quarterly Officer/Committee Report 2019/2020	
Executive Council Meeting Date	Oct 22, 2019
	Yakima Convention Center
Officer/Committee Information	
Office Held/Committee Name:	Fiscal Planning Committee
Officer/Committee Chair:	Kelly Forsberg, FPC Chair
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 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 type="checkbox"/>
Goal 4: Increase member participation in Association activities	<input type="checkbox"/>
Goal 5: Continually improve methods and processes for communicating with the membership	<input 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 type="checkbox"/>
Goal 7: Maintain and enhance the diversity of our membership and the Executive Committee	<input type="checkbox"/>
Goal 8: Collaborate and coordinate with other organizations and associations in order to serve our members more efficiently and effectively	<input type="checkbox"/>
Specific Officer/Committee Goals (<i>Include progress toward goals and measurement of success.</i>)	<ul style="list-style-type: none"> Design Master Calendar and Procedure docs for Internal Audit Handle WFAA Treasurer Totes, send off to Gonzaga (Treasurer) Start making calls out to Financial Planners who work on an as-needed basis



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	<ul style="list-style-type: none"> Track update of CPI information to Investment Spreadsheet
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Summary of Activities *(Descending Chronological)*

October 22nd – attend WFAA meeting via Zoom
 October 14th - held Investment Training with Sarah, Louisa, and Jim
 September, '19 - (no activity)
 August 7th, '19 - attended EC Summer Meeting

Budget Information

Approved Budget	N/A		
Budget Expenditures to Date	N/A		
Event Information <i>(complete if applicable)</i>	N/A		
Event Name			
Location			
Date			
	Number	Cost of Registration	Subtotal
Attendees			
Complimentary Registrations <i>(if applicable – i.e., scholarship recipients)</i>			

Add more rows as needed for additional events.

