

President

January

- Participate in conference program planning

February

- Hold Exec Council telnet
- Participate in conference program planning

March

- Participate in conference program planning

April

- Hold Exec Council meeting
- Attend spring conference and pass the gavel at the conclusion

May

June

- Host Exec Council Summer Retreat
- Send reminder email to about membership renewal

July

- Attend NASFAA Conference
- Collect budgets from committee chairs
- Participate in conference program planning

August

- Hold Finance committee meeting
- Participate in conference program planning

September

- Hold Exec Council telnet
- Participate in conference program planning

October

- Attend MASFAA conference
- Participate in conference program planning

November

- Attend IASFAA fall conference
- Attend Financial Aid Awareness Declaration

December

- Attend FSA conference
- Hold Exec Council telnet

President-Elect

July

- Attend NASFAA Conference
- Collect budgets from committee chairs
- Participate in conference program planning

August

- Hold Finance committee meeting
- Participate in conference program planning

September

- Hold Exec Council telnet
- Participate in conference program planning

October

- Attend MASFAA conference
- Participate in conference program planning

November

- Attend IASFAA fall conference
- Attend Financial Aid Awareness Declaration

December

- Attend FSA conference
- Hold Exec Council telnet

July

- Officially begin President-Elect year
- Participate in closing of the IASFAA books
- Find out which state exchange will participate in and when their conference occurs

August

- Participate in closing of the IASFAA books if not done in July
- Finance Committee meeting to set budgets for the year

September

- Begin to think about person to ask to be on the IASFAA ballot
- Update Committee calendars if necessary

October

- Continue to think about and contact persons to be on the IASFAA ballot

November

- IASFAA Fall Training
- Finalize persons to be on the IASFAA Ballot and collect information for Electronic Services to begin the process of setting up the electronic ballot.

December

- Hold IASFAA elections/continue to work with Electronic Services regarding set up and timeline

Past President

January

- Attend MASFAA winter Exec Council meeting in spring of past presidency term

February

March

- Submit MASFAA blog for state update in spring of past president term

April

- Past presidency begins at spring conference and runs until the next April. MASFAA duties begin in October of your term and run until the next October. You will overlap with the next Past President

May

June

- Exec Council Summer Retreat (usually end of month)
- Attend MASFAA Exec Council summer retreat (usually beginning of month, coinciding with MASFAA summer institute possibly.)
- Submit MASFAA blog for state update in spring of your past presidency

July

August

- Participate in IASFAA Finance committee budget meeting

September

- Submit MASFAA blog for state update

October

- Attend first Exec Council meeting for MASFAA Board as State Rep in beginning of your past presidency term. This is held at the MASFAA conference

November

- Attend Exec council board meeting for IASFAA
- Participate at Business meeting at fall IASFAA conference

December

- Submit MASFAA blog for state update

Vice-President

January

- Setup phone meetings
- Reconciliation

February

- Setup phone meetings
- Reconciliation

March

- Setup phone meetings
- Reconciliation

April

- Setup phone meetings
- Reconciliation

May

- Setup phone meetings
- Reconciliation

June

- Setup phone meetings
- Reconciliation

July

- Setup phone meetings
- Reconciliation
- Year-end reconciliation typically held

August

- Setup phone meetings
- Reconciliation

September

- Setup phone meetings
- Reconciliation

October

- Setup phone meetings
- Reconciliation

November

- Setup phone meetings
- Reconciliation

December

- Setup phone meetings
- Reconciliation

Secretary

January

- Email Executive Council members a reminder to send their report before the monthly meeting to be included in the minutes
- Take notes during meetings and compile minutes
- Before next meeting email minutes to members for review

February

- Email Executive Council members a reminder to send their report before the monthly meeting to be included in the minutes
- Take notes during meetings and compile minutes
- Before next meeting email minutes to members for review

March

- Email Executive Council members a reminder to send their report before the monthly meeting to be included in the minutes
- Take notes during meetings and compile minutes
- Before next meeting email minutes to members for review

April

- Email Executive Council members a reminder to send their report before the monthly meeting to be included in the minutes
- Take notes during meetings and compile minutes
- Before next meeting email minutes to members for review
- Spring Conference

May

- Email Executive Council members a reminder to send their report before the monthly meeting to be included in the minutes
- Take notes during meetings and compile minutes
- Before next meeting email minutes to members for review

June

- Exec. Council retreat
- Email Executive Council members a reminder to send their report before the monthly meeting to be included in the minutes
- Take notes during meetings and compile minutes
- Before next meeting email minutes to members for review

July

- Email Executive Council members a reminder to send their report before the monthly meeting to be included in the minutes
- Take notes during meetings and compile minutes
- Before next meeting email minutes to members for review

August

- Email Executive Council members a reminder to send their report before the monthly meeting to be included in the minutes
- Take notes during meetings and compile minutes
- Before next meeting email minutes to members for review

September

- Email Executive Council members a reminder to send their report before the monthly meeting to be included in the minutes
- Take notes during meetings and compile minutes
- Before next meeting email minutes to members for review

October

- Email Executive Council members a reminder to send their report before the monthly meeting to be included in the minutes
- Take notes during meetings and compile minutes
- Before next meeting email minutes to members for review

November

- Fall Conference
- Email Executive Council members a reminder to send their report before the monthly meeting to be included in the minutes
- Take notes during meetings and compile minutes
- Before next meeting email minutes to members for review

December

- Email Executive Council members a reminder to send their report before the monthly meeting to be included in the minutes
- Take notes during meetings and compile minutes
- Before next meeting email minutes to members for review

Treasurer and Treasurer-Elect

January

- Monthly entering of payments and pay bills.

February

- Monthly entering of payments and pay bills.

March

- Monthly entering of payments and pay bills.

April

- Monthly entering of payments and pay bills.

May

- Monthly entering of payments and pay bills.

June

- Monthly entering of payments and pay bills.
- Exec Council Meeting.

July

- Monthly entering of payments and pay bills.
- Reconcile and Close Books

August

- Monthly entering of payments and pay bills.
- Approve Budgets

September

- Monthly entering of payments and pay bills.
- Prepare reports for Accountant – Tax Return

October

- Monthly entering of payments and pay bills

November

- Monthly entering of payments and pay bills.

December

- Monthly entering of payments and pay bills.

Delegates

January

February

- Review Conflict of Interest Policy every odd year.

March

April

- Attend IASFAA Spring Conference

May

June

- Attend IASFAA Summer Retreat
- Set up time and location to meet with Treasurer-elect, Treasurer and President-Elect to review books

July

- Review of books

August

September

October

- IASFAA Salary Survey can be completed every odd year
- Update Fact Book

November

- Set up phone meeting to discuss updates to the P & P and Addendums.

December