



NCASFAA OPERATIONAL CALENDAR

Elected Officers, Committee Chairs, Liaisons

Elected Officers

President

<i>Month</i>	<i>Activity</i>
July	<p>Approve agenda for July board meeting Preside over board meeting Prepare and submit NCASFAA board report Review budget and expenditures and report any corrections that are needed to the treasurer Work with chair of Budget and Finance Committee to finalize annual budget Schedule September board meeting Submit SASFAA board report Attend SASFAA Executive Board meeting Write & send personal notes and NCASFAA lapel pins to new NCASFAA members Attend NASFAA conference</p>
August	<p>Review expense vouchers submitted by board members and submit to Treasurer (Report any corrections that are needed) Begin fall conference planning Work with the Publicity & Publications Chair Committee chair on fall newsletter "Message from President" Write & send personal notes and NCASFAA lapel pins to new NCASFAA members</p>
September	<p>Approve agenda for September board meeting Preside over September NCASFAA board meeting Prepare and submit report for NCASFAA September Board meeting Review expense vouchers submitted by board members and submit to Treasurer (Report any corrections that are needed) Continue to work with fall conference chair & committee Write & send personal notes and NCASFAA lapel pins to new NCASFAA members</p>
October	<p>Finalize fall conference plans Review expense vouchers submitted by board members and submit to Treasurer (Report any corrections that are needed) Write & send personal notes and NCASFAA lapel pins to new NCASFAA members Prepare and submit SASFAA board report Prepare remarks for fall conference</p>

November	<p>Approve agenda for November board meeting Preside over November NCASF AA board meeting Prepare and submit report for NCASF AA November board meeting Attend Fall NCASF AA Conference Attend November SASF AA board meeting Review expense vouchers submitted by board members and regular invoices and submit to Treasurer (Report any corrections that are needed) Write & send personal notes and NCASF AA lapel pins to new NCASF AA members</p>
December	<p>Work with SASF AA secretary on room and travel arrangements for annual SASF AA conference Review expense vouchers submitted by board members and regular invoices and submit to Treasurer(Report any corrections that are needed) Write & send personal notes and NCASF AA lapel pins to new NCASF AA members</p>
January	<p>Review expense vouchers submitted by board members and regular invoices and submit to Treasurer(Report any corrections that are needed)</p> <p>Begin spring conference planning</p> <p>Write & send personal notes and NCASF AA lapel pins to new NCASF AA members</p> <p><i>Prepare and gather items for a SASF AA annual conference promotional table to be displayed at current annual conference if NC is the host state the next year!!</i></p> <p>Prepare a NC state gift basket for SASF AA charity</p>
February	<p>Approve agenda for February/March board meeting Preside over February/March board meeting Prepare and submit report for NCASF AA February board meeting Prepare and submit SASF AA board report Attend SASF AA Annual Conference Work with spring conference chair and committee on conference planning Review expense vouchers submitted by board members and regular invoices and submit to Treasurer (Report any corrections that are needed)</p> <p>Write & send personal notes and NCASF AA lapel pins to new NCASF AA members</p>

March	<p>Review expense vouchers submitted by board members and regular invoices and submit to Treasurer.(Report any corrections that are needed)</p> <p>Work with spring conference chair and committee on conference planning</p> <p>Write & send personal notes and NCASF AA lapel pins to new NCASF AA members</p> <p>Prepare remarks (script) for spring conference</p>
April	<p>Approve agenda for April board meeting Preside over April board meeting Prepare and submit report for NCASF AA April board meeting</p> <p>Attend Spring NCASF AA Conference</p> <p>Participate in internal audit of NCASF AA financial records</p> <p>Work with the President Elect on planning the June transition retreat and setting agenda Review expense vouchers submitted by board members and regular invoices and submit to Treasurer(Report any corrections that are needed)</p> <p>Write & send personal notes and NCASF AA lapel pins to new NCASF AA members</p>
May	<p>Work with the President- Elect on planning the June transition retreat and finalize agenda</p> <p>Review expense vouchers submitted by board members and regular invoices and submit to Treasurer(Report any corrections that are needed)</p> <p>Write & send personal notes and NCASF AA lapel pins to new NCASF AA members</p>

June	<p>Attend NCASFAA transition retreat and lead the meeting on the first day Prepare and submit SASFAA board report Attend SASFAA transition retreat</p> <p>Review expense vouchers submitted by board members and regular invoices and submit to Treasurer(Report any corrections that are needed)</p>
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President-Elect

<i>Month</i>	<i>Activity</i>
July	Gather all information at transition meeting from President's Prepare for NCASF AA September board meeting Review budget and expenditures and report any corrections that are needed to the treasurer
August	Review expense vouchers submitted by the President and submit to Treasurer - Report any corrections that are needed
September	Prepare and submit report for NCASF AA September Board meeting Attend NCASF AA September board meeting Review expense vouchers submitted by the President and submit to Treasurer - Report any corrections that are needed
October	<i>Start to identify committee chairs for year as president</i> Review expense vouchers submitted by the President and submit to Treasurer - Report any corrections that are needed
November	Prepare and submit report for NCASF AA November board meeting Attend Fall NCASF AA Conference and November board meeting Review expense vouchers submitted by the President and submit to Treasurer - Report any corrections that are needed

December	<p><i>Plan and prepare travel request for SASFAA President-Elect workshop</i></p> <p><i>Plan and prepare travel request for NASFAA Leadership and Legislative Conference</i></p> <p>Review expense vouchers submitted by the President and submit to Treasurer</p> <ul style="list-style-type: none"> - Report any corrections that are needed
January	<p><i>Finalize committee chair selections</i></p> <p>Review expense vouchers submitted by the President and submit to Treasurer</p> <ul style="list-style-type: none"> - Report any corrections that are needed
February	<p>Prepare and submit report for NCASFAA February board meeting</p> <p>Attend February NCASFAA board meeting</p> <p>Attend SASFAA President-Elect Workshop</p> <p>Review expense vouchers submitted by the President and submit to Treasurer</p> <ul style="list-style-type: none"> - Report any corrections that are needed
March	<p>Attend NASFAA Leadership and Legislative Conference</p> <p>Set location of June transition retreat, and communicate with the board you will serve with during your year as president</p> <p>Work with acting Treasurer to evaluate current budget and start looking at operating budget for active year</p> <p>Review expense vouchers submitted by the President and submit to Treasurer</p> <p>Report any corrections that are needed</p>

April	<p>Prepare and submit report for NCASF AA November board meeting</p> <p>Attend Spring NCASF AA Conference and November board meeting</p> <p>Send follow up communication to the board you will serve with during your year as president about the June transition retreat</p> <p>Work with the President on planning the June transition retreat and setting agenda</p> <p>Review expense vouchers submitted by the President and submit to Treasurer</p> <ul style="list-style-type: none"> - Report any corrections that are needed
May	<p>Work with the President on planning the June transition retreat</p> <p>Review expense vouchers submitted by the President and submit to Treasurer</p> <ul style="list-style-type: none"> - Report any corrections that are needed
June	<p>Attend NCASF AA transition retreat and be prepared to lead the meeting on the last day</p> <p>Work with Technology Chair to update information on the web and to direct communications to you instead of current President</p> <p><i>Attend SASF AA transition retreat and prepared for all agenda items</i></p> <p>Review expense vouchers submitted by the President and submit to Treasurer</p> <ul style="list-style-type: none"> - Report any corrections that are needed

Past-President- Nominations & Elections

<i>Month</i>	<i>Activity</i>
July	After first NEW Board meeting, send email and touch base with Committee and send them the P and P information letting them know their responsibilities for the year
August	
September	SASF AA Nominations and Elections you will be led by the Past President with e-mails for nominations which you will send to the NCASF AA membership and then conference calls to discuss candidates
October	Touch base with the committee so they can be networking at the conference and discussing the possible nominations for positions with those attending
November	
December	
January	<p>Get the technology chair to update the web site so the nominations will come to your email</p> <p>Send email and let the committee know that the meeting will need to be the end of or first of February in order to meet the 30 day requirement for presenting the slate to the membership.</p> <p>Send email to membership to solicit nominations. Committee can submit official nominations through the system as well</p> <p>** Make sure that you tell everyone to speak with the nominee before submitting their name. so they won't be surprised if nominated and back out (almost happened to me)**</p> <p>Schedule meeting better in person but can have conference call or some in person and some conference call</p> <p>Compile nominations. Make sure all nominations come through the system for accountability</p> <p>Meet with committee and vote and decide the slate of candidates</p> <p>Contact each candidate and congratulate them for being selected to run and request statement of candidacy, short resume, and picture. Also contact any candidates not selected if necessary just to keep them possibly agreeing to run in the future. This depends on the situation</p>

February	<p>First Present the slate to the President and the President –Elect</p> <p>Second Present the slate to the Board (information only no vote)</p> <p>Present the slate to the membership 30 days prior to the Business Meeting</p> <p>Submit collected docs to Technology Chair to put on the web site and also to the publications chair to include in the newsletter</p> <p>Determine the start and ending dates of the election to give to the tech chair to put on the site</p> <p>Tech chair should send you an email to test the voting. After everything looks good he will let you know.</p> <p>Send an email to the membership that voting is open and when it will end.</p>
March	
April	<p>Have a meeting at the conference get everyone’ cell number of committee and candidate</p> <p>Make sure treasurer updates any members that add at conference so they can vote electronically</p> <p>Meet with committee after the voting ends to verify the results Technology chair will work with you to deliver this information</p>
May	
June	

Vice-President

<i>Month</i>	<i>Activity</i>
July	Attend NCASF ^{AA} Transitional Board meeting Prepare and submit report Prepare and submit budget request form
September	Attend NCASF ^{AA} Board meeting Prepare and submit report Review budget and expenditures and report any corrections that are needed to the Treasurer
November	Attend Fall NCASF ^{AA} Conference Attend NCASF ^{AA} Board meeting Prepare and submit report Review budget and expenditures and report any corrections that are needed to the Treasurer
January	Attend NCASF ^{AA} Board meeting Prepare and submit report Review budget and expenditures and report any corrections that are needed to the Treasurer
February	Plan the luncheon/event for the new aid officers which is held during the Spring conference
March	Finalize and confirm plans for new aid officers event held during Spring Conference
April	Attend Spring NCASF ^{AA} Conference Attend NCASF ^{AA} Board meeting Prepare and submit report Review budget and expenditures and report any corrections that are needed to the Treasurer
June	

Secretary

<i>Month</i>	<i>Activity</i>
July	<p>Attend NCASF AA transition board meeting</p> <p>Prepare and submit report</p> <p>Provide policy of requests to update the <i>Policy and Procedures Manual</i> to new board members</p> <p>Prepare name cards for all board members, committee chairs and guests</p> <p>Attend July board meeting and take notes to prepare minutes</p> <p>Submit “draft” of minutes to board within 30 days after the board meeting</p>
August	<p>Make any necessary corrections to “draft” minutes and send out to all board members to review for corrections.</p>
September	<p>E-mail agenda for the September board meeting</p> <p>Attend NCASF AA Board Meeting- prepare sign in sheet for meeting. E mail prior board meeting minutes and board reports to all board members prior to the meeting.</p> <p>Submit minutes of prior board meeting for approval</p> <p>Submit approved minutes of July meeting to ATAC for archiving and posting on the website</p> <p>Work on any special projects as assigned by the president (i.e., operational calendar)</p>
October	<p>E mail all board members request for official board report 2 weeks before next Board meeting.</p>
November	<p>Attend fall NCASF AA Conference and board meeting</p> <p>Prepare and submit board report</p> <p>Receive agenda from the President for the November board meeting</p> <p>E-mail agenda for the November board meeting</p> <p>Attend NCASF AA Board Meeting- prepare sign in sheet for meeting. E mail prior board meeting minutes and board reports to all board members prior to the meeting.</p> <p>Submit minutes of prior board meeting for approval</p> <p>Submit approved minutes of September meeting to ATAC for archiving and posting on the website</p> <p>Submit “draft” of minutes to board within 30 days</p>

December	Make any necessary corrections to “draft” minutes and send out to Board members for any corrections.
January	Receive agenda from the President for the February board meeting E-mail agenda for the February board meeting and the minutes of the last executive board meeting Prepare for February board meeting E mail all Board members request for official Board report 2 weeks before next Board meeting.
February	Attend NCASFAA Board meeting Submit minutes of the November board meeting for approval Submit approved minutes of November board meeting to ATAC for archiving Provide name cards for all board members, committee chairs and guests Prepare and submit report concerning any recommended changes to the Policy and Procedures Manual of the association
March	Submit “draft” of the board meeting minutes to board within 30 days for review. E mail all Board members request for official Board report 2 weeks before next Board meeting. Receive agenda from the President for the April board meeting E-mail agenda for the April board meeting

April	Attend NCASFAA Spring Conference and annual business meeting. Report on total membership number at business meeting- number can be provided by Membership Chair. Submit minutes of the previous year’s annual business session to the membership electronically for their approval. Take minutes of the annual business session. Submit approved annual conference business session minutes to ATAC for archiving and posting on the website Attend NCASFAA Board Meeting- prepare sign in sheet for meeting. Email prior Board meeting minutes and Board reports to all Board members prior to the meeting.
May	Submit “draft” of the board meeting minutes to board within 30 days for Review E mail all Board members request for official Board report 2 weeks before next Board meeting. Receive agenda from President and E-mail agenda for June transition board meeting and previous board meeting minutes

June	<p>Attend transition board meeting and take notes to prepare the minutes</p> <p>Submit minutes of the April board meeting and for approval</p> <p>Submit approved minutes of April board meeting to ATAC for archiving and posting on the website</p> <p>Receive agenda for the July board meeting from the president</p> <p>E-mail agenda for July board meeting and previous board meeting minutes</p> <p>Prepare and submit report</p> <p>Provide name cards for all board members, committee chairs and guests</p> <p>Submit revised <i>NCASFAA Policy and Procedure Manual</i> if necessary.</p> <p>Turn over secretary's materials to newly elected secretary within 60 days after the transitional board meeting</p>
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Treasurer

<i>Month</i>	<i>Activity</i>
July	Distribute NCASFAA credit cards Pay bills when received Make deposits as required Reconcile bank statements Provide summary of accounts at the board meeting Reconcile Paypal Pay ATAC monthly fee
August	Pay bills when received Make deposits as required Prepare for internal audit Reconcile bank statements Enter membership payments Reconcile and pay credit card statement Reconcile Paypal Pay ATAC monthly fee Pay Quickbooks fee
September	Pay bills when received Make deposits as required Reconcile Paypal Reconcile and pay credit card statement Pay liability insurance Enter membership payments Review conference registration form Reconcile bank statements Enter Conference payments Attend board meeting Provide summary of accounts at the board meeting Pay ATAC monthly fee
October	Pay bills when received Make deposits as required

	<p>File the 990 Reconcile PayPal Enter membership payments Reconcile bank statements Reconcile and pay credit card statements Enter Conference payments Pay ATAC monthly fee Pay Bank Miles fee</p>
November	<p>Pay bills when received Make deposits as required Reconcile PayPal Enter membership payments Enter conference payments Reconcile and pay credit card statements Attend board meeting Reconcile bank statements Provide summary of accounts at the board meeting Pay conference bills Internal audit Assist with onsite registration and payments for Fall conference Pay ATAC monthly fee</p>
December	<p>Pay bills when received Make deposits as required Reconcile PayPal Enter membership payments Reconcile and pay credit card statements Reconcile bank statements Pay ATAC monthly fee Contact non-paid Conference Attendees</p>
January	<p>Pay bills when received Make deposits as required Reconcile PayPal Enter membership payments Reconcile bank statement Reconcile and pay credit card statement Pay ATAC monthly fee Pay BMI registration fee</p>

February	<p>Attend board meeting</p> <p>Pay bills when received</p> <p>Make deposits as required</p> <p>Review conference registration form</p> <p>Reconcile PayPal</p> <p>Enter membership payments</p> <p>Reconcile and pay credit card statement</p> <p>Reconcile bank statements</p> <p>Provide summary of accounts at the board meeting</p> <p>Enter conference payments</p> <p>Pay ATAC monthly fee</p> <p>Process MSESF Camp Expenses</p>
March	<p>Pay bills when received</p> <p>Make deposits as required</p> <p>Reconcile PayPal</p> <p>Enter membership payments</p> <p>Reconcile bank statements</p> <p>Reconcile and pay credit card statement</p> <p>Enter conference payments</p> <p>Pay ATAC monthly fee</p> <p>Process MSESF Camp Expenses</p>
April	<p>Pay bills when received</p> <p>Make deposits as required</p> <p>Reconcile PayPal</p> <p>Enter membership payments</p> <p>Enter conference payments</p> <p>Reconcile and pay credit card statement</p> <p>Reconcile bank statements</p> <p>Attend board meeting</p> <p>Provide summary of accounts at board meeting</p> <p>Assist with onsite registration and payments for spring conference</p> <p>Pay Bonding Insurance</p> <p>Pay ASCAP registration fee</p> <p>Pay ATAC monthly fee</p> <p>Process MSESF Camp Expenses</p>
May	<p>Pay bills when received</p> <p>Make deposits as required</p> <p>Reconcile PayPal</p> <p>Reconcile and pay credit card statement</p> <p>Reconcile bank statements</p> <p>Enter membership payments</p> <p>Pay ATAC monthly fee</p> <p>Process MSESF Camp Expenses</p> <p>Contact non-paid Conference Attendees</p>

June	Attend transition board meeting Provide summary of accounts at board meeting Pay bills when received Make deposits as required Reconcile PayPal Collect old credit cards Verify or set-up credit card accounts for incoming officers Reconcile bank statements Reconcile and pay credit card statement Set up checking accounts and CDs Transfer all files and information to the new treasurer Order new checks and deposit slips, if necessary Set up new files for income and expenses Set up new mailing address Pay ATAC monthly fee Enter membership payments Process MSESF Camp Expenses
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Committee Chairs

Budget & Finance

<i>Month</i>	<i>Activity</i>
July	<p>Attend board meeting Prepare and submit board report Have budget completed to be voted on at meeting. Be prepared to make any changes that may be discussed and updated at the meeting in order to be able to revise and vote if necessary.in order to prevent a delay of an operating budget being completed.</p>
August	
September	<p>Attend board meeting Review treasurer report Prepare report for meeting Address any budgetary questions if any.</p>
October	<p>Monitor income and expenditure information to make sure budget is remaining on track for the year</p>
November	<p>Attend board meeting Prepare and submit board report Address any budgetary questions if any.</p> <p>Monitor income and expenditure information to make sure budget is remaining on track for the year.</p> <p>Review Professional Affiliates information to verify projected number of participants is on track.</p> <p>After conference, check conference expenses to verify the Fall conference stayed within projected budget.</p> <p>Coordinate and oversee internal audit of prior year revenue & expenses. The audit should take place on Sunday morning at the fall conference and include past & current NCASFAA Presidents, current and prior year Treasurer, Treasurer Elect if applicable, and prior year Budget & Finance chair and any adhoc members as needed. Prepare and submit final report from internal audit.</p>
December	
January	

February	<p>Attend board meeting Prepare and submit board report Address any budgetary questions if any. Monitor income and expenditure information to make sure budget is remaining on track for the year.</p>
March	<p>Monitor income and expenditure information to make sure budget is remaining on track for the year.</p>
April	<p>Attend board meeting Prepare and submit board report Address any budgetary questions if any.</p> <p>Monitor income and expenditure information to make sure budget is remaining on track for the year.</p> <p>Post Conference, review conference expenses to monitor if projected budget has been met.</p>
May	<p>Request the new board members from the President-elect. Send an official budget request to each new member and ask them to communicate with the previous chair to construct a reasonable budget request to be voted on at the first new board meeting in July. This can be discussed more at the transition retreat between old and new chairs.</p>
June	<p>Attend transition board meeting Prepare and submit board report</p> <p>Collect all budget requests and create an operating budget for the upcoming year, July1 – June 30. This board report should include the projected budget for the upcoming board that will be voted on in July.</p>

Diversity/Veterans Task Force

July	Outline up-coming year activities. Coordinate with SASFAA's Global Initiatives Committee Prepare board report and attend board meeting
August	Quarterly meeting with Department of Education Under-resourced Division
September	Initiate outline for PSA/YouTube piece on IDR options Attend DOE Social Media Meeting.
October	Disseminate/coordinate best practices in IDR promotion

November	Prepare board report and attend board meeting. Conference presentation on Recruitment and Retention of Diverse Demographic.
December	
January	Quarterly meeting Department of Education Under resourced Division Meeting with Department of Education Digital Media Initiate pilot for Digital Media at WSSU Re-organize NCASFAA presentation for SASFAA-add Iraqi war veteran to presenters
February	SASFAA presentation
March	
April	Continue editing IDR/fraud YouTube piece Include VASFAA's diversity leadership Prepare board report and attend board meeting. Write script for "Understanding your Award Letter" in Spanish

May	
June	All expenses sent to treasurer. Transitional activities

Professional Affiliates

<i>Month</i>	<i>Activity</i>
July	Attend board meeting Prepare and submit board report
August	Send out initial invitation to prospective Professional Affiliates inviting them to participate as a sponsor of NCASF AA attaching the NCASF AA Professional Affiliates Policy and Level of Support Form.
September	Attend board meeting Prepare and submit board report
October	Send out another email to prospective and secured Professional Affiliates about sponsorship opportunities and preliminary information on upcoming fall conference including hotel shipping information and any conference details that are relevant to the Professional Affiliates
November	Attend board meeting Prepare and submit board report Two weeks prior to the conference date send out email to all Professional Affiliates who confirmed attendance. Provide them with conference agenda, vending times, vendor recognition date and time, and any other information they may need to know about the conference. In addition they are provided the preliminary conference registration list. The week after the conference, send out a “thank you” email for attending and provide information for the spring conference and the final conference attendee listing
December	
January	
February	Attend board meeting Prepare and submit board report Send out email to confirmed and any new Professional Affiliates announcing the Spring Conference, it’s location, and preliminary information.
March	Send email to confirmed Professional Affiliates who will be attending the Spring Conference including hotel shipping information and any conference details that are relevant to the Professional Affiliates

April	<p>Attend board meeting Prepare and submit board report Two weeks prior to the conference date send out email to all Professional Affiliates who confirmed attendance. Provide them with conference agenda, vending times, vendor recognition date and time, and any other information they may need to know about the conference. In addition they are provided the preliminary conference registration list. The week after the conference, send out a “thank you” email for attending and provide information for the spring conference and the final conference attendee listing.</p>
May	
June	<p>Attend transition board meeting Prepare and submit board report</p>

Legislative Advisory

<i>Month</i>	<i>Activity</i>
July	Attend board meeting Prepare and submit board report Submit budget proposal to president, treasurer and budget and finance chair
August	Send emails as necessary to keep membership informed on recent legislative developments
September	Attend board meeting Prepare and submit board report Send emails as necessary to keep membership informed on recent legislative developments
October	Send emails as necessary to keep membership informed on recent legislative developments
November	Attend board meeting Prepare and submit board report Send emails as necessary to keep membership informed on recent legislative developments
December	Send emails as necessary to keep membership informed on recent legislative developments
January	Send emails as necessary to keep membership informed on recent legislative developments
February	Attend board meeting Prepare and submit board report Send emails as necessary to keep membership informed on recent legislative developments
March	Attend SASFAA hill visits, if scheduled Send emails as necessary to keep membership informed on recent legislative developments

April	Attend board meeting Prepare and submit board report Send emails as necessary to keep membership informed on recent legislative developments
May	Send emails as necessary to keep membership informed on recent legislative developments
June	Attend transition board meeting Prepare and submit board report Send emails as necessary to keep membership informed on recent legislative developments

Membership

<i>Month</i>	<i>Activity</i>
July	Attend board meeting Prepare and submit board report Submit budget proposal to president, treasurer and budget and finance chair
August	Purchase any supplies that will be needed for Fall and Spring Conferences (envelopes, names badges, ribbons, mailing labels)
September	Attend board meeting Prepare and submit board report
October	
November	Attend board meeting Prepare and submit board report Prepare name badges and ribbons for Fall conference. Coordinate with Treasurer to prepare for conference registration
December	
January	
February	Attend board meeting Prepare and submit board report
March	
April	Attend board meeting Prepare and submit board report Prepare name badges and ribbons for Spring conference Coordinate with Treasurer to prepare for conference registration
May	
June	Attend transition board meeting Prepare and submit board report

Professional Advancement –New Aid Officers

Month	Activity
July	Prepare and submit board report Attend board meeting Submit budget proposal to president, treasurer and budget and finance chair (if
August	Determine topics to be covered during fall conference workshop Create agenda for fall workshop Start preparing PowerPoints for fall workshop sessions
September	Prepare and submit board report Attend board meeting
October	Email PowerPoints and agenda to session leaders, workshop registrants and conference AV coordinator Purchase supplies if needed for workshop (copy paper, pens, name badges, etc.) Create name badges for registrants
November	Prepare and submit board report Attend board meeting Attend fall conference
December	Work with conference committee as needed
January	Work with conference committee as needed
February	Prepare and submit board report Attend board meeting
March	Work with conference committee as needed
April	Prepare and submit board report Attend board meeting
May	
June	Prepare and submit board report Attend transition board meeting

Professional Advancement- Intermediate Aid Officers

<i>Month</i>	<i>Activity</i>
July	Attend NCASF AA Transitional Board meeting Prepare and submit report
September	Attend NCASF AA Board meeting Prepare and submit report
November	Attend Fall NCASF AA Conference Attend NCASF AA Board meeting Prepare and submit report Post conference: *Confirm Federal Trainer who will attend Spring conference *Begin planning session ideas (may conduct survey if no information available as to desired sessions) *Begin planning and reaching out to potential presenters
January	Attend NCASF AA Board meeting Prepare and submit report Continue planning/ reaching out to presenters
February	Continue planning sessions, communicating with presenters and collecting presentations
March	Finalize and confirm sessions/ schedule Make sure all sessions have been submitted for website
April	Attend Spring NCASF AA Conference Conduct IAO Training Prepare and submit report for Board meeting (may not be able to attend) Distribute surveys
June	Attend NCASF AA transition retreat and be prepared to share all pertinent information with incoming Chair

Professional Advancement – Webinars

<i>Month</i>	<i>Activity</i>
July	Attend board meeting Prepare and submit board report Submit budget proposal to president, treasurer and budget and finance chair Review webinar topics and evaluations from previous year
August	Request sponsorship information from treasurer
September	Attend board meeting Prepare and submit board report Request updated sponsorship information from treasurer
October	Request topic suggestions from membership via email Plan webinar topics for Fall term (1 topic per platinum level sponsor) Submit webinar information in Fall newsletter Develop evaluation via survey monkey
November	Attend board meeting Prepare and submit board report Review budget and expenditures and report any corrections that are needed to the treasurer Report webinar evaluation results to board
December	Request updated sponsorship information from treasurer
January	Request topic suggestions from membership via email
February	Attend board meeting Prepare and submit board report Review budget and expenditures and report any corrections that are needed to the treasurer Report webinar evaluation results to board
March	Plan webinar topics for Spring term Submit webinar information in Spring newsletter
April	Attend board meeting Prepare and submit board report Review budget and expenditures and report any corrections that are needed to the treasurer Report webinar evaluation results to board
May	Compile all webinar evaluations for transition meeting
June	Attend transition board meeting Prepare and submit board report Review budget and expenditures and report any corrections that are needed to the treasurer

Program Committee-Fall Conference

<i>Month</i>	<i>Activity</i>
January	Review hotel contract and previous conference expenditures Prepare budget request for April Board meeting based on prior year costs and review of upcoming Fall conference site contract
February	Attend board meeting Prepare and submit board report and budget proposal for Fall conference Work with Spring Conference Chair to assist with conference activities
March	Work with Spring Conference Chair to assist with conference activities Find options for keynote speaker Review prior conference general and concurrent session topics
April	Attend board meeting Prepare and submit board report Attend Spring Conference and assist with conference activities
May	Send request for conference committee members Continue to review prior conference general and concurrent session topics
June	Attend transition board meeting Prepare and submit board report Review budget and expenditures and report any corrections that are needed to the treasurer Finalize keynote speaker Work with President to select conference theme
July	Attend board meeting Prepare and submit board report Review budget and expenditures and report any corrections that are needed Begin fall conference committee meetings Select charity for conference Develop conference subcommittees for conference tasks Review speakers requested/secured and seek any additional speakers needed
August	Continue conference committee meetings with updates from conference subcommittees Contact hotel to review their timeline for tentative and final menu selections, numbers, and AV requests Start compiling tentative agenda, sessions, and general information for attendees (hotel rate, parking info, directions, registration costs, etc.) Review speakers and obtain bios

September	<p>Attend board meeting</p> <p>Prepare and submit board report</p> <p>Send email out to listserv regarding tentative agenda, tentative session topics and other important points such as hotel rate, parking rate, and registration fee</p> <p>Send out e-mail regarding charity and requesting silent auction items</p> <p>Continue to work on general session and concurrent session topics</p> <p>Continue to work on conference agenda</p> <p>Confirm speakers and receipt of bios</p> <p>Send out request for session moderators</p> <p>Tentatively assign sessions to time slots and rooms for sessions</p> <p>Develop session descriptions and have presenters review for content of their session</p> <p>Develop meal functions</p> <p>Obtain AV needs for Fall conference sessions</p> <p>Monitor room block with hotel</p> <p>Secure rooms/charges to be applied under hotel master bill</p> <p>Arrange conference committee and executive board dinner</p>
October	<p>Finalize general session and concurrent session topics</p> <p>Finalize conference agenda</p> <p>Finalize session moderators</p> <p>Send out another request regarding charity/silent auction items</p> <p>Contact special guests for arrival and departure times and make arrangements for transportation, if necessary</p> <p>Assign sessions to time slots and rooms and notify presenters</p> <p>Finalize all session descriptions and have presenters review for content of their session</p> <p>Finalize food and beverage events with the hotel</p> <p>Review of Master Bill room list with hotel</p> <p>Ensure annual meeting “script” is finalized with President</p> <p>Send final information regarding conference activities to membership and post final full agenda with session descriptions and ads to website</p>
November	<p>Conduct final review of conference event with hotel and AV staff</p> <p>Final confirmation of speakers and travel arrangements as required</p> <p>Final review of master bill room list</p> <p>Prepare and submit report for pre-conference board meeting</p> <p>Hold conference committee meeting at conference site (pre-conference)</p> <p>Attend pre-conference board meeting</p> <p>Attend conference and annual business meeting</p> <p>Attend conference and be on hand to triage any issues or needs during conference between NCASFAA and hotel personnel</p>

December	<p>Review final bills from November conference for accuracy and report for payment or any corrections that are needed to the treasurer</p> <p>Prepare documentation to give to next year's conference chair at June transition meeting</p> <p>Send thank you notes and/or letters to all involved with the conference</p>
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Program Committee - Spring Conference

<i>Month</i>	<i>Activity</i>
July	Attend board meeting Prepare and submit board report Submit budget proposal to president, treasurer and budget and finance chair
August	Review hotel contract and previous conference expenditures Work with Fall Conference Chair to assist with conference activities
September	Attend board meeting Prepare and submit board report Review budget and expenditures and report any corrections that are needed to the treasurer
October	Find options for keynote speaker Review prior conference general and concurrent session topics Continue to work with Fall Conference Chair
November	Attend board meeting Prepare and submit board report Review budget and expenditures and report any corrections that are needed to the treasurer Attend Fall Conference and assist with conference activities
December	Send request for conference committee members Finalize keynote speaker Work with President to select conference theme
January	Finalize conference committee members Finalize conference theme Develop subcommittees for conference tasks Notify committee members of initial committee meeting Begin to develop general session and concurrent session topics Begin to develop tentative conference agenda Determine conference charity

February	<p>Attend board meeting Prepare and submit board report Review budget and expenditures and report any corrections that are needed to the treasurer Finalize conference logo Work with Technology Chair for conference registration Contact special guests and VIPs for biography, name, title, address, telephone and fax numbers, e-mail and hotel room preferences Arrange hotel/travel accommodations for special guests Work with Professional Affiliates Chair to determine number of affiliates Initial development of meal functions Update conference website Email membership regarding registration and conference activities If applicable, order conference committee shirts and conference bags (or giveaways) Coordinate complimentary registrations with president and treasurer Determine conference entertainment, if applicable, and president's reception</p>
March	<p>Obtain AV needs for sessions Send email out to listserv regarding tentative agenda, tentative session topics and other important points such as hotel rate, parking rate, and registration fee Finalize general session and concurrent session topics Finalize conference agenda Finalize session moderators Contact special guests for arrival and departure times and make arrangements for transportation Assign sessions to time slots and rooms and notify presenters Finalize all session descriptions and have presenters review for content of their session Finalize meal functions Finalize all AV needs for sessions Invite new members to new members luncheon Monitor room block with hotel Arrange conference committee and executive board dinner</p>
April	<p>Attend board meeting Prepare and submit board report Review budget and expenditures and report any corrections that are needed to the treasurer Finalize food and beverage events with the hotel Ensure annual meeting "script" is finalized Send final information regarding conference activities to membership Attend conference and annual business meeting</p>
May	<p>Send thank you notes and/or letters to all involved with the conference Compile all conference information for transition meeting</p>

June	Attend transition board meeting Prepare and submit board report Review budget and expenditures and report any corrections that are needed to the treasurer Forward all conference information to the next year's conference chair
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Publications and Publicity

Month	Activity
July	Attend NCASFAA board meeting Determine timeline for yearly publications of the summer, fall, and spring newsletters Take photos of Board meeting and Board members
August	Publish summer newsletter by mid-month
September/ October	Attend NCASFAA Board meeting Take photos of Board meeting and Board members (if new photos are required) Publish fall newsletter three weeks before fall conference
November	Attend NCASFAA board meeting Attend Fall NCASFAA Conference Take photos of conference proceedings, including pictures of President and Professional Affiliates for conference slideshow
February	Attend NCASFAA Board meeting Take photos of Board meeting and Board members (if new photos are required)
March	Publish elections newsletter no later than 30 days prior to the spring conference. Publish spring newsletter three weeks prior to spring conference
April	Attend NCASFAA board meeting Attend Spring NCASFAA Conference Take photos of conference proceedings, including pictures of President and Professional Affiliates for conference slideshow
June	Attend NCASFAA transition board meeting Provide all documents, newsletters, photos, etc. for archiving purposes

Site Selection

<i>Month</i>	<i>Activity</i>
July	Attend NCASF ^{AA} Transitional Board meeting Prepare and submit report Prepare and submit budget request form
August & September	Attend NCASF ^{AA} Board meeting Prepare and submit report Site visits for fall conference, two years in advance of conference
November	Attend Fall NCASF ^{AA} Conference Attend NCASF ^{AA} Board meeting Prepare and submit report Present site options to board so board can vote on fall conference site
January	
February	
March & April	Site visits for spring conference, two years in advance of conference
April	Attend Spring NCASF ^{AA} Conference Attend NCASF ^{AA} Board meeting Prepare and submit report Present site options to board so board can vote on spring site conference
June	Attend board transition meeting

State and High School Relations

Month	Activity
July	<ul style="list-style-type: none"> • Attend NCASFSA Transition Board Meeting <ul style="list-style-type: none"> ○ Transition with New State and High School Relations Chair ○ Provide new Chair with necessary contacts and previous year's survey information
August	
September	<ul style="list-style-type: none"> • Make initial contact with Alicia Johnson in Governor's Office • Check with SEAA for updated information about NC FAFSA Filers for Governor's Proclamation • Prepare and send out first survey links via list-serv • Prepare article for newsletter
October	<ul style="list-style-type: none"> • Follow up with Alicia for any changes to the data elements for Governor's Proclamation • Send out reminder to complete survey via list-serv
November	<ul style="list-style-type: none"> • Prepare and Submit Board Report • NCASFSA Board Meeting • Send out last reminder for survey completion
December	<ul style="list-style-type: none"> • Receive Governor's Proclamation of Financial Aid Awareness Week • Compile survey data / attempt to fill in blanks as necessary by contacting schools
January	
February	<ul style="list-style-type: none"> • Work with SEAA for press release about Financial Aid Awareness Week • Make sure website is updated with Survey Information • Make sure FAFSA Day Volunteers have updated Survey Information • Prepare and submit New Letter article • FAFSA Day
March	<ul style="list-style-type: none"> • Prepare and Submit Board Report • NCASFSA Board Meeting
April	<ul style="list-style-type: none"> • Prepare and Submit Board Report • NCASFSA Board Meeting • Turn in Governor's Proclamation and any survey information to Immediate Past President for Archiving
May	
June	<ul style="list-style-type: none"> • Prepare and Submit Board Report • NCASFSA Board Meeting • Prepare for Transition Board Meeting • Complete and Submit Budget Request

Technology Task Force

<i>Month</i>	<i>Activity</i>
July	<ul style="list-style-type: none">Attend NCASFAA board/transition meetingPrepare and submit reportReview budget and expenditures and report any corrections that are needed to the treasurerBring up new web designUpdate website with new registration formChange welcome page and executive board page to reflect new administration to include letter from the presidentObtain pictures of executive board members to post to the websitePost the annual report and long range planning report to the websiteSubmit expenditures to treasurer
August	<ul style="list-style-type: none">Update website as necessarySubmit expenditures to treasurer
September	<ul style="list-style-type: none">Update website as necessaryUpdate sponsorship information on the web in conjunction with sponsorship committee chairSubmit expenditures to treasurer
October	<ul style="list-style-type: none">Update website with Fall conference informationSubmit expenditures to treasurerSubmit report to Publicity and Publications Chair for NCASFAA Beacon

November	<p>Attend NCASF AA board meeting Attend Fall Conference Prepare and submit report Update website as necessary Submit expenditures to treasurer</p>
December	<p>Update website as necessary Submit expenditures to treasurer</p>
January	<p>Update website as necessary Submit expenditures to treasurer</p>
February	<p>Update website as necessary Submit expenditures to treasurer Prepare and submit report Attend NCASF AA board meeting</p>
March	<p>Update website as necessary Submit expenditures to treasurer Update website with Spring conference information Update website with voting information Submit report to Publicity and Publications Chair for NCASF AA Beacon</p>
April	<p>Update website as necessary Submit expenditures to treasurer Attend Spring Conference Meet with Elections committee at Spring Conference</p>

Middle School Enrichment

<i>Month</i>	<i>Activity</i>
July	<p>End of July or at conclusion of individual student's camp – mail certificates, evaluation and congratulatory letter to student's home address</p> <p>Consider a student for presentation at NCASF AA conference</p> <p>Focus on fundraising opportunities</p>
August	<p>Update scholarship brochure, all announcement documents, and NCASF AA website with current information</p> <p>Confirm application mailing address (use co-chair's local college address or PO box)</p>
September	<p>Forward information on the scholarship (including Summer Enrichment Announcement) to Nicole Roach at NCSEAA. She will send an announcement to several list serves in NC; Student Services Directors, NCSCA, and DPI Counselors.</p> <p>Forward information on the scholarship to TRIO programs, GEAR UP, community organizations, school counselors, etc.</p> <p>Target organizations with middle school students and ask the CFNC</p>
October	<p>Collect applications from Yahoo account and mailing address</p> <p>Ask CFI to add MSE Scholarship as a "Hot Topic" on CFNC's homepage for the months of October and November</p>

November	<p>Collect applications from Yahoo account and mailing address</p> <p>Send deadline reminder emails to all middle school contacts via CFNC Regional Reps, NCSEAA's list serves, etc.</p> <p>Schedule scholarship subcommittee meeting for first or second week in <u>December to review applications/essays and choose finalists</u></p>
December	<p>December 1st is the deadline each year. If this falls on a weekend, forward to following Monday.</p> <p>Scholarship selection subcommittee meets to review all applications/essays and choose finalists</p> <p>Notify non-winners (via email or letter to home)</p> <p>Notify finalists at home (via letter) and at school (via email to school counselor) and request letter of recommendation (also be sure that proof of free/reduced lunch has been received) with appropriate due date.</p> <p>Schedule scholarship selection subcommittee meeting (via conference call or email) to choose winners based on letter of recommendation and review of student essay (should be done in January or February). Scan finalists' applications, essays and letters of recommendation ahead of time and email to subcommittee</p>
January	<p>Scholarship subcommittee chooses winners from group of finalists (via email ranking): three from each region (east-910&252, west-828&704, central-919&336) and at least three alternates (one from each region). <i>Targeted date January 15</i></p> <p>Notify winners (via letter home and email to school counselor)</p> <p>Notify non-winners (via letter to home)</p> <p>Email school counselor mentor packet with volunteer form</p> <p>Select deadline to select camps (should be by first of March)</p>
February	<p>Schedule mentor conference call to review entire process and answer questions</p> <p>Remind mentors of deadline to select camp</p>
March	<p>Deadline to select camps (communicating with mentor). <i>Targeted date March 1</i></p>

<p>April</p>	<p>Be sure that all forms are in (mentor forms, photo release forms, scholarship agreements, etc.)</p> <p>Mentor needs to submit application for camp TO THE CAMP and email/fax committee chair a copy. Committee chair will need this information in order to request funding from NCASFSA.</p> <p>Chair will fill out NCASFSA camp voucher for all recipients and submit to treasurer via fax. Voucher will include cost for camp only – not to exceed \$1,000 maximum. Check will be sent directly to camp.</p> <p>Chair needs to be in contact with camp (via email or telephone) to explain scholarship and inform them that payment is on its way.</p> <p>Chair will fill out NCASFSA expense voucher to cover mileage to and from camp (not to exceed \$1,000 maximum) for each recipient and submit to treasurer via fax. Committee chair may also request (as needed) \$25 for snack money for each recipient. Check will be sent directly TO CHAIR.</p>
<p>May</p>	<p>Chair will send letter, return envelope, and check for mileage to recipient's home address in the attention of the recipient's parent/guardian. <i>Mail check one week prior to camp begin date</i></p> <p>Mail non-winner letters to alternates as necessary</p>
<p>June</p>	<p>Be sure that all expenses are to treasurer by 6/30 for the end of the fiscal year.</p> <p>Email evaluation form to mentor and ask for return by end of summer</p>

Liaison Reports

State Agency

July	Prepare report and attend board meeting.
August – October	Work with conference committee as needed.
November	Prepare report and attend board meeting. Attend fall conference.
February	Prepare report and attend board meeting. Promote FAFSA Day attendance/volunteerism. Attend SASFAA conference.
April	Prepare report and attend board meeting. Attend spring/annual conference.
June	Prepare report and attend transition board meeting.