NCASFAA OPERATIONAL CALENDAR

Elected Officers, Committee Chairs, Liaisons

Elected Officers

President

Month	***Activity***
July	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
August	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
September	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
October	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

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

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

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

President-Elect

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

December	***Plan and prepare travel request for SASFAA President-Elect workshop*** ***Plan and prepare travel request for NASFAA Leadership and Legislative Conference*** Review expense vouchers submitted by the President and submit to Treasurer - Report any corrections that are needed
January	***Finalize committee chair selections*** Review expense vouchers submitted by the President and submit to Treasurer - Report any corrections that are needed
February	Prepare and submit report for NCASFAA February board meeting Attend February NCASFAA board meeting Attend SASFAA President-Elect Workshop Review expense vouchers submitted by the President and submit to Treasurer - Report any corrections that are needed
March	Attend NASFAA Leadership and Legislative Conference Set location of June transition retreat, and communicate with the board you will serve with during your year as president Work with acting Treasurer to evaluate current budget and start looking at operating budget for active year Review expense vouchers submitted by the President and submit to Treasurer Report any corrections that are needed

April	Prepare and submit report for NCASFAA November board meeting Attend Spring NCASFAA Conference and November board meeting Send follow up communication to the board you will serve with during your year as president about the June transition retreat Work with the President on planning the June transition retreat and setting agenda Review expense vouchers submitted by the President and submit to Treasurer - Report any corrections that are needed
May	Work with the President on planning the June transition retreat Review expense vouchers submitted by the President and submit to Treasurer - Report any corrections that are needed
June	Attend NCASFAA transition retreat and be prepared to lead the meeting on the last day Work with Technology Chair to update information on the web and to direct communications to you instead of current President ***Attend SASFAA transition retreat and prepared for all agenda items*** Review expense vouchers submitted by the President and submit to Treasurer - Report any corrections that are needed

Past-President- Nominations & Elections

Month	***Activity***
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	SASFAA Nominations and Elections you will be led by the Past President with e-mails for nominations which you will send to the NCASFAA 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	Get the technology chair to update the web site so the nominations will come to your email 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. Send email to membership to solicit nominations. Committee can submit official nominations through the system as well ** 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)** Schedule meeting better in person but can have conference call or some in person and some conference call Compile nominations. Make sure all nominations come through the system for accountability Meet with committee and vote and decide the slate of candidates 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

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

Vice-President

Month	***Activity***
July	Attend NCASFAA Transitional Board meeting Prepare and submit report Prepare and submit budget request form
September	Attend NCASFAA Board meeting Prepare and submit report Review budget and expenditures and report any corrections that are needed to the Treasurer
November	Attend Fall NCASFAA Conference Attend NCASFAA Board meeting Prepare and submit report Review budget and expenditures and report any corrections that are needed to the Treasurer
January	Attend NCASFAA 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 NCASFAA Conference Attend NCASFAA Board meeting Prepare and submit report Review budget and expenditures and report any corrections that are needed to the Treasurer
June	•

Secretary

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

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

Treasurer

Month	***Activity***
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 File 990 with Accountant (Late July or Early August)
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 Participate in Conference Committee Meetings and encourage a tentative agenda and conference registration availability in September
October	Pay bills when received Make deposits as required

	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 Send reminder email that conference payments are due prior to the event
November	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
December	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
January	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

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

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 Change E-Procurement contact information to new treasurer

Committee Chairs

Budget & Finance

Month	***Activity***
July	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.
August	
September	Attend board meeting Review treasurer report Prepare report for meeting Address any budgetary questions if any.
October	Monitor income and expenditure information to make sure budget is remaining on track for the year
November	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. Review Professional Affiliates information to verify projected number of participants is on track. After conference, check conference expenses to verify the Fall conference stayed within projected budget. 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.
December	
January	

February	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.
March	Monitor income and expenditure information to make sure budget is remaining on track for the year.
April	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. Post Conference, review conference expenses to monitor if projected budget has been met.
May	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.
June	Attend transition board meeting Prepare and submit board report 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.

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 bests 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

Month	***Activity***
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 NCASFAA attaching the NCASFAA 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	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.
May	
June	Attend transition board meeting Prepare and submit board report

Legislative Advisory

Month	***Activity***
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

Month	***Activity***
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 expenses are anticipated for fall workshop) Solicit input regarding fall conference workshop topics
August	Determine topics to be covered during fall conference workshop Create agenda for fall workshop Start preparing PowerPoints for fall workshop sessions Begin soliciting leaders for fall workshop sessions
September	Prepare and submit board report Attend board meeting Confirm session leaders and topic(s)
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 Attend spring conference (if possible)

May	
June	Prepare and submit board report Attend transition board meeting

Professional Advancement- Intermediate Aid Officers

Month	***Activity***
July	Attend NCASFAA Transitional Board meeting Prepare and submit report
September	Attend NCASFAA Board meeting Prepare and submit report
November	Attend Fall NCASFAA Conference Attend NCASFAA 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 NCASFAA 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 NCASFAA Conference Conduct IAO Training Prepare and submit report for Board meeting (may not be able to attend) Distribute surveys
June	Attend NCASFAA transition retreat and be prepared to share all pertinent information with incoming Chair

Professional Advancement – Webinars

Month	***Activity***
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 – Spring Conference

Month	***Activity***
January	Fall Conference Chair – work with Spring Conference Chair *Spring Conference Chair* • *Verify activities with conference site* • *Room reservation options and deadlines* • *Submission of menus and attendance numbers* • *Audio/Visual needs* • *Finalize agenda* • *Continue working with Publicity Chair to make announcements about the conference and charity*
February	Attend board meeting and submit report Fall Conference Chair - work with Spring Conference Chair to assist with conference activities *Spring Conference Chair* • *Provide agenda information to membership via website and listserv announcements* • *Conference Committee meeting(s)* • *Work with committee members to complete assignments and meet deadlines* • *Continue working with Publicity Chair to make announcements about the conference and charity* • *Monitor room block and alert President if there are any issues* • *Arrange Sunday dinner for Board, Conference Committee, and Intermediate Aid Instructors (and others as directed by the President)PRIOR to the Fall Conference (if possible):*
March	PRIOR to the Fall Conference (if possible): - Visit fall conference site with President-Elect (and Spring Conference Chair) - Discuss theme, possible keynote speaker, other general session speakers, and other special activities with President-Elect - Request NASFAA speaker (if President-Elect wants to invite someone) FOLLOWING the Fall Conference - Work with Spring Conference Chair to assist with related activities
April	PRIOR to the Fall Conference - Continue working with President-Elect to plan conference FOLLOWING the Fall Conference - Attend board meeting and submit report - Attend Spring Conference and assist with related activities *Spring Conference time!* • *Work with Publicity Chair In the week prior to the conference to send daily reminders/teasers about the conference* • *Arrive on Saturday and conduct final review with event staff on site* • *Attend board meeting and submit report* • *Committee meeting to stuff packets, review assignments, etc.* • *Attend conference and be on hand to handle any issues* • *Review conference evaluations and provide information to Spring Conference Chair* • *Ensure that the President has a successful conference* • *Thank committee members and others for a job well done!*

May	PRIOR to the Fall Conference - Continue working with President-Elect to plan conference - Review conference evaluations from Spring conference that just concluded in April FOLLOWING the Fall Conference - Prepare documents to share with next year's conference chairs at the Transition Board Meeting *Spring Conference:* • *Review final bills from conference* • *Distribute evaluation results to Spring Conference chair, next year's chairs, Executive Board and committee members* • *Thank committee members and others again* • *Relax and vow never to do this again!!!!*
June	Attend transition board meeting PRIOR to the Fall Conference - Work with President-Elect to solicit committee members and plan first committee meeting - Prepare budget request - Finalize keynote speaker, other general session speakers if possible - Finalize plans for FSA trainer to attend the conference - Finalize time schedule for conference related activities FOLLOWING the Fall Conference - Provide information to next year's conference chairs *PRIOR to the Spring Conference* • *Prepare budget request*
July	Attend board meeting and submit report (if applicable) Review budget Fall Conference Chair - Hold Conference Committee meeting (recommendation is conference call/webinar) - Work with committee members to complete assignments as needed - Work with Publicity Chair to make announcement via listserv (by end of July) *Spring Conference Chair* • *Work with Fall conference chair to assist with related activities*
August	Conference Committee meeting(s) Verify activities with conference site - Room reservation options and deadlines - Submission of menus and attendance numbers - Audio/Visual needs Finalize agenda Continue working with Publicity Chair to make announcements about the conference and charity

September	Attend board meeting and submit report Provide agenda information to membership via website and listserv announcements Conference Committee meeting(s) Work with committee members to complete assignments and meet deadlines Continue working with Publicity Chair to make announcements about the conference and charity Monitor room block and alert President if there are any issues Arrange Sunday dinner for Board, Conference Committee, and New Aid Instructors (and others as directed by the President)
October	Conference Committee meeting(s) Finalize agenda and publish on website – announce publication on listserv Verify that pocket agenda, nametags, and session signs will be ready Review assignment of complimentary rooms Review list of conference fee waivers Monitor room block Monitor registrations Work with President on - script for conference (if applicable) - schedule for pictures with Professional Affiliates during the conference - Professional Affiliates Appreciation Reception (and have President send invitations to them) - Invitations for other special guests - Hospitality activities Continue working with Publicity Chair to make announcements about the conference and charity
November	Work with Publicity Chair In the week prior to the conference to send daily reminders/teasers about the conference Arrive on Saturday and conduct final review with event staff on site Attend board meeting and submit report Committee meeting to stuff packets, review assignments, etc. Attend conference and be on hand to handle any issues Review conference evaluations and provide information to Spring Conference Chair Ensure that the President has a successful conference Thank committee members and others for a job well done!
December	Review final bills from conference Distribute evaluation results to Spring Conference chair, next year's chairs, Executive Board and committee members Thank committee members and others again Relax and vow never to do this again!!!! Review budget *Spring Conference Chair* • *Hold Conference Committee meeting (recommendation is conference call/webinar)* • *Work with committee members to complete assignments as needed* • *Work with Publicity Chair to make announcement via listserv*

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

Month	***Activity***
July	Attend NCASFAA Transitional Board meeting Prepare and submit report Prepare and submit budget request form
August & September	Attend NCASFAA Board meeting Prepare and submit report Site visits for fall conference, two years in advance of conference
November	Attend Fall NCASFAA Conference Attend NCASFAA 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 NCASFAA Conference Attend NCASFAA 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	• Attend NCASFAA Transition Board Meeting
	  ○ Transition with New State and High School Relations Chair
	  ○ Provide new Chair with necessary contacts and previous year's survey information

August	
September	• 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	• 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	• Prepare and Submit Board Report • NCASFAA Board Meeting • Send out last reminder for survey completion
December	• Receive Governor's Proclamation of Financial Aid Awareness Week • Compile survey data / attempt to fill in blanks as necessary by contacting schools
January	
February	• 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	• Prepare and Submit Board Report • NCASFAA Board Meeting
April	• Prepare and Submit Board Report • NCASFAA Board Meeting • Turn in Governor's Proclamation and any survey information to Immediate Past President for Archiving
May	
June	• Prepare and Submit Board Report • NCASFAA Board Meeting • Prepare for Transition Board Meeting • Complete and Submit Budget Request

Technology Task Force

Month	***Activity***
July	Attend NCASFAA board/transition meeting Prepare and submit report Review budget and expenditures and report any corrections that are needed to the treasurer Bring up new web design Update website with new registration form Change welcome page and executive board page to reflect new administration to include letter from the president Obtain pictures of executive board members to post to the website Post the annual report and long range planning report to the website Submit expenditures to treasurer
August	Update website as necessary Submit expenditures to treasurer
September	Update website as necessary Update sponsorship information on the web in conjunction with sponsorship committee chair Submit expenditures to treasurer
October	Update website with Fall conference information Submit expenditures to treasurer Submit report to Publicity and Publications Chair for NCASFAA Beacon

November	Attend NCASFAA board meeting Attend Fall Conference Prepare and submit report Update website as necessary Submit expenditures to treasurer
December	Update website as necessary Submit expenditures to treasurer
January	Update website as necessary Submit expenditures to treasurer
February	Update website as necessary Submit expenditures to treasurer Prepare and submit report Attend NCASFAA board meeting
March	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 NCASFAA Beacon
April	Update website as necessary Submit expenditures to treasurer Attend Spring Conference Meet with Elections committee at Spring Conference

Middle School Enrichment

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

November	Collect applications from Yahoo account and mailing address Send deadline reminder emails to all middle school contacts via CFNC Regional Reps, NCSEAA's list serves, etc. Schedule scholarship subcommittee meeting for first or second week in December to review applications/essays and choose finalists
December	December 1st is the deadline each year. If this falls on a weekend, forward to following Monday. Scholarship selection subcommittee meets to review all applications/essays and choose finalists Notify non-winners (via email or letter to home) 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. 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
January	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). *Targeted date January 15* Notify winners (via letter home and email to school counselor) Notify non-winners (via letter to home) Email school counselor mentor packet with volunteer form Select deadline to select camps (should be by first of March)
February	Schedule mentor conference call to review entire process and answer questions Remind mentors of deadline to select camp
March	Deadline to select camps (communicating with mentor). *Targeted date March 1*

April	Be sure that all forms are in (mentor forms, photo release forms, scholarship agreements, etc.) 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 NCASFAA. Chair will fill out NCASFAA 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. Chair needs to be in contact with camp (via email or telephone) to explain scholarship and inform them that payment is on its way. Chair will fill out NCASFAA 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.
May	Chair will send letter, return envelope, and check for mileage to recipient's home address in the attention of the recipient's parent/guardian. *Mail check one week prior to camp begin date* Mail non-winner letters to alternates as necessary
June	Be sure that all expenses are to treasurer by 6/30 for the end of the fiscal year. Email evaluation form to mentor and ask for return by end of summer

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.