Save the completed report using title and date (*example: CASFAA\_Quarterly Report <insert Officer/Committee Name\_mm/dd/yy.doc*). Submit your report via email to the CASFAA Executive Council listserv. Reports will be saved to Google Drive.

| Quarterly CASFAA Officer Report | | | |
| --- | --- | --- | --- |
| Executive Council Meeting Date: |  | | |
| Executive Council Meeting Location: |  | | |
|  |  | | |
| Officer Information | | | |
| Office Held: |  | | |
| Officer *(Name, Place of Employment, State)* |  | | |
|  | | | |
| Goals for Service Year | | | |
| Strategic Plan Goals that are being met *(check all that apply)* | | |  |
| Goal 1: Serve as a resource for all financial aid professionals in California | | | ☐ |
| Goal 2: Increase association membership engagement to provide a worthwhile and meaningful experience | | | ☐ |
| Goal 3: Advocate for educational access for California’s students and serve as an authority in the State on student aid issues | | | ☐ |
| Goal 4: Increase and maintain association membership to continue to meet financial goals and support CASFAA’s financial sustainability | | | ☐ |
| Goal 5: Foster inclusion and equip members to assist the diverse populations we serve. | | | ☐ |
| Goal 6: Improve preparedness and experience of Executive Council members | | | ☐ |
| Specific Officer/Committee Goals*(Include progress toward goals and measurement of success.)* |  | | |
|  | | | |
| Summary of Activities for the Quarter | | | |
| No committee yet. | | | |
|  | | | |
| Measures Tracking Tool Data Collection Information *(Include required Measures Tracking Tool data collection information to help determine progress toward Strategic plan goals/activities that are the responsibility of your Office/Committee.* | | | |
|  | | | |
|  | | | |
| Budget Information | |  | |
| Approved Budget | $ | | |
| Budget Expenditures to Date | 4.  5.  TOTAL = $ | | |
|  | | | |

|  | |
| --- | --- |
| Calendar of Events/Timelines | |
| Date | Description |
|  |  |
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