

PLANNING, BUDGETING, AND EVALUATION SYSTEM
PREPARING DIVISION/DEPARTMENT PLANS AND BUDGET REQUESTS
FISCAL YEAR 2008-09

Steps/Actions

These guidelines are intended to facilitate the completion of the Division/Department Plan and Budget Request Format. Plans and budget requests are prepared for divisions (major cost centers) and departments/programs (cost centers). They are reviewed by Vice Presidents and then the President, approved, and presented to the Board of Directors as part of the annual planning and budgeting process. The following steps are suggested for divisions and departments to complete the preparation of the planning format.

1. Review the NASFAA Annual Plan as the principal guiding document for ascertaining what are the overall priorities of the association for the upcoming fiscal year.
2. Determine which objectives from the Annual Plan that your division/department should endeavor to advance or have impact on during the fiscal year, 2008-09.
3. Develop a set of operational objectives (preferably no more than 3-5) which encompass the basic or “maintenance” functions of the division/department representing what is expected and/or required on a year-to-year basis in order to fulfill the core responsibilities of the division/department (these objectives may be cross-referenced to any appropriate operational objectives in the Annual Plan). Enter the objectives in the Division/Department Plan Format. If activities are included underneath objectives, they should be identified with lower case letters (a, b, etc) and should be few in number.
4. Develop a set of developmental objectives (preferably no more than 3-7) which represent the new or “developmental” initiatives, those which are above-and-beyond normal operations and are intended to advance or enhance the work of the association (these objectives may be cross-referenced to any appropriate developmental objectives in the Annual Plan). Enter the objectives in the Division/Department Plan Format. If activities are included underneath objectives, they should be identified with lower case letters (a, b, etc) and should be few in number.
5. Consider any budgetary impacts of these objectives and discuss them with the appropriate Vice President or the President of NASFAA. A space has been provided in the Format for listing any budget items that are critical for inclusion in FY 2008-09. **Otherwise, divisions/departments are not asked to complete budget requests for the upcoming year.** The budget for the coming year has already been developed and approved. In future years, however, divisions/departments will submit budget requests along with their plans in order that the next budget cycle will reflect a programmatic approach to budget planning and approval.

6. Identify any revenue goals that your division/department might be expected to achieve and the target amount(s); enter the information in the Format.
7. Determine the performance indicators, measures, or outcomes for the division/department which will serve as the basis for assessment at the end of the year.
8. Complete the Division/Department Plan Format and forward it to the appropriate Vice President or the President.

Attachments:

1. Division/Department Plan and Budget Request Format
2. NASFAA Cost Centers
3. NASFAA Annual Plan, 2008-09

**DIVISION/DEPARTMENT PLAN AND BUDGET REQUEST
NATIONAL ASSOCIATION OF FINANCIAL AID ADMINISTRATORS**

Division/Cost Center: _____

FY: _____ **Operating Budget:** **Other:** _____

Objectives and Activities

Operational Objectives/Activities

- 1.
- 2.
- 3.

Developmental Objectives/Activities

- 1.
- 2.
- 3.
- 4.
- 5.

Budget Request Items	Amount	Explanation
1.		
2.		
3.		
4.		
5.		

Revenue Goals/Type	Amount	Explanation
1.		
2.		
3.		

Performance Indicators (Divisions only)

- 1.
- 2.
- 3.

Please prepare separate plans/requests for grants and special funds.

COST CENTERS
NATIONAL ASSOCIATION OF FINANCIAL AID ADMINISTRATORS

Major Cost Centers

- 1.0** Division of Program & Services (DPS)
- 2.0** Division of Finance & Administration (DFA)
- 3.0** Division of Governmental Relations (DGR)
- 4.0** Division of Planning & Development (DPD)
- 5.0** Executive Administration (EA)

Cost Centers

Division of Programs & Services

- 1.1** General Administration
- 1.2** Training & Professional Development
 - 1.2.1** Tech Initiatives & Distance Learning
 - 1.2.2** Conference Planning & Advertising
 - 1.2.3** PATRA
- 1.3** Marketing & Member Services
 - 1.3.1** Marketing
 - 1.3.2** Membership Services
- 1.4** Special Projects

Division of Finance & Administration

- 2.1** General Administration
- 2.2** Accounting & Finance
- 2.3** Web Communications
- 2.4** Human Resources
- 2.5** Computer Services

Division of Governmental Relations

- 3.1** General Administration
- 3.2** Legal & Regulatory Analysis
- 3.3** Research & Policy Analysis

Division of Planning & Development

- 4.1** General Administration

Executive Administration

- 5.1** General Administration
 - 5.1.1** Board Services & Support
 - 5.1.2** Communications