

November 9, 2007

To: Laura Boesler, Chair  
Ellie Geiman, Chair-Elect  
DE-DC-MD Executive Board  
From: Jacqueline G. Daughtry-Miller  
Historian  
Subject: **Historical Society Committee Minutes of November 8, 2007**

The Historical Society Committee met by telephone conferencing on November 8, 2007. The Committee members are:

- Jacqui Daughtry-Miller, Independence Bank
- Herm Davis, National College Scholarship Foundation
- Ken Howard, D.C. State Education Office
- Sam Magronne, Wilmington College
- Gary Spoales, Bank of America
- Cheryl Watson, Howard University
- Barbara Williams, American University School of Law

The items discussed are the Newsletters compilation; Updating of the histogram and what shall be included, updating the Tri-State web site; retreat meeting to update files; questionnaire to update membership information; audit reporting; receipt of materials from association secretary.

▪ **Committee Assignments:**

- **Daughtry:** Will send Board minutes to Research Committee. Look at archived newsletters to determine the first electronic newsletter. Reprint Historical report and distribute to new committee members and others. Follow up on audits and with secretary for inclusion of files.
- **Davis:** Continue to update Histogram. Will continue to focus on Tri-State news. Current Board minutes will assist in being proactive in approach.
- **Howard:** Update Omega members (sadly, our recent Omega members increased to include: Roscoe Dann, Doug Boucher, Ken Robinson & Larry DiGregorio)
- **Magronne:** Update history on Delaware association activities and continue to play a key part in association history.
- **Spoales:** Has identified the missing Newsletters and will make requests to former newsletter editors and the membership.
- **Watson:** Prepare new questionnaire to be distributed at Tri-State Fall training conference to determine activity and update history.
- **Williams:** Lend a hand to assist with newsletter printing.
- **All Historian Committee members:** Send the names of 2-3 persons as likely candidates for Historical Committee with contact information.

In light of the negative media publicity of the financial aid industry, the Committee voiced concern with the mission statement of the Association. The association mission statement does not include a statement about our primary reason for being in the financial aid field: our service to better help students become more productive members of society through education and how to finance it in the best possible way.

The **vision statement** of the organization is:

The Association will be a model organization that provides proactive leadership in the Financial Aid Industry by setting new directions for the future and by meeting the needs of its members in the following areas:

- Provide leadership and high quality education and training
- Acting as a link to and influence on other vital organizations (EASF~~AA~~, NASF~~AA~~, DOE, etc)
- Promoting our profession
- Providing support and resources as a clearing house for information and ideas
- Providing vital customer services to promote and maintain membership, and encouraging active participation by all members

The Committee respectfully suggests the following language (new language is highlighted and underlined):

The Association will be a model organization which provides quality service to students by engaging in proactive leadership in the Financial Aid Industry, by setting new directions for the future, and by meeting the needs of its members in the following areas:

- Advising students how to best finance their college education
- Providing leadership and high quality education and training to its members.
- Acting as a link to and influence on other vital organizations (EASF~~AA~~, NASF~~AA~~, USED, etc).
- Promoting our profession.
- Providing support and resources as a clearing house for information and ideas.
- Providing vital customer services to promote and maintain membership, and encouraging active participation by all members.