



NAE4-HA Team Plan of Work

Team: Finance & Operations

Date: November 21, 2014

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Team Leader: Shawn Tiede
VP Finance & Operations

NAE4-HA Strategic Goal:

- ❑ Meet the needs of youth development professionals by maximizing the use of technology.
- ❑ Provide progressive levels of professional development.
- ❑ Elevate the quality of youth development work through scholarship, research and practice.
- ❑ Advocate for the 4-H youth development profession.
- ❑ Facilitate networking throughout the association and the youth development profession.

Objective	Action Steps	Position/Person Responsible	Target Date	Status Report	Budget Amount
2014 Audit & 990 Filing	* Finalize FY14 financial reports and bank account reconciliations.	Shawn Tiede / NAE4-HA Audit Committee / Executive Director	3/15/15 for FY14 Audit to be started.		\$8,000 for audit
Conference Revenue Policies	* Continue to update policies & guidelines for conference financials at least quarterly.	Shawn Tiede / Executive Director/ Finance Team / Kori Meyers (VP Professional Development)	3/1/15 6/1/15 9/1/15 12/1/15		
NAE4-HA Financial Reporting	* Provide audited FY13 financial report and FY15 budget summary to Finance Team for sharing with state leadership at 2015 JCEP meetings. * Have year-end FY14 audited financial report ready for distribution to membership by 2015 NAE4-HA Conference.	Shawn Tiede / Executive Director / Finance Team	2/1/15		
Financial Policy Handbook	* Continue to update policies & guidelines for overall financial policy handbook.	Shawn Tiede / Finance Team	10/1/2015		

Create a Board Policy Handbook	Pulling all board level policies and procedures together into one central source.	Bernie Wiesen / Policy & Resolutions Committee	Spring Board 2015		
Create Template to standardize VP team handbooks	Many handbooks have redundant and/or conflicting information. Pulling redundant information into the central handbook and creating a clean consistent format.	Bernie Wiesen / Policy & Resolutions Committee	Fall Board 2015		