



RSAI Leadership Group Agenda November 8, 2023 at 12 pm

Via Zoom or at ISFIS 1201 63rd Street, Des Moines, IA 50311
(Contact jen@iowaschoolfinance.com for Zoom link)

Leadership Group Members: *Paul Croghan (Chair), Scott Williamson (Vice-Chair), Dan Peterson (Secretary/Treasurer), Justin Daggett, Brent Jorth, Dan Maeder, Nick Trenkamp. AEA representative – Jason Plourde.*

I Call to Order by Chair Croghan

II Approve Agenda

III Approve Meeting Minutes

- Annual Meeting Minutes from October 17, 2023
- Leadership Group Organizational Meeting Minutes from October 17, 2023

IV Review Membership Report

V Approve Monthly Financials and Corporate Sponsors

VI Mission Critical Actions/Updates

- Annual Meeting Debrief from October 17, 2023 in Ankeny
 - Attendance & Logistics
 - Press Release/Publicity
 - Reflections
- 2024 Priorities
 - Prioritization Exercise Results
 - Priority Language in Support of AEA
- IASB Tradeshow Booth Assignments
- TPRA Grant Update
- Leadership Group Member Updates (anything to share with the group?)

VII Other Business

VIII Upcoming Meeting Dates:

- January 10, 2024
- February 14, 2024
- March 13, 2024
- April 10, 2024
- May 8, 2024
- July 10, 2024
- August 14, 2024
- September 11, 2024
- October 15, 2024 – Annual Meeting with Leadership Group Organizational Meeting to follow

IX. Adjourn