

EASFAA LONG RANGE STRATEGIC PLAN 2007-2012

INTRODUCTION

EASFAA's strategic long range planning process began in 1991-92, the presidential year of Bill Irwin. George Chin was named chair of the Long Range Planning Committee, and he established the need for a formal long - range plan. In 1992-93, under the presidency of Richelle Emerick, Bob Condon chaired the Strategic Long Range Planning process. The first formal planning document was adopted by the Council and was distributed to the EASFAA membership at the annual conference in May 1993.

In June 1996, at the EASFAA Council retreat, with Doug Bucher as President and Susan Howard as chair of Long Range Strategic Planning, the second phase of the process began. Two days were devoted to the review and discussion of EASFAA's plan. The full Council, with the additional of several past presidents, looked at five major areas that represented the services and then current focus of the organization. The basic premise was to accept EASFAA's mission statement as it was articulated in the first plan and to focus on developing visions of where EASFAA should be headed as an organization. An action plan framework was then written for each of nine areas.

In the spring of 2001, EASFAA conducted a membership survey, seeking input into various areas of the organization. The results of the survey were tabulated and evaluated. The information was used at the Council retreat, held in June 2001 under the presidency of Robert Shorb with Susan Howard as Long Range Strategic Planning Chair. Over the course of two days, elected officers, state representatives, committee chairs and past presidents of EASFAA participated in a comprehensive review of where the association is today and where it needs to place its priorities over the next five years.

This plan has been reviewed and updated in 2006-2007 by the Strategic Planning Committee. Please refer to Appendix A. In the Appendix you will find the Environmental Scan that was used to guide the committee in developing this current plan. All EASFAA organizational relationships, both internal and external to EASFAA, are woven into this plan.

The specific areas covered by the revised Strategic Plan are:

Communication	Conference
Federal Relations	Finance and Development
Governance	Graduate and Professional
Leadership Development	Membership
Multicultural Diversity	Training

Each year EASFAA Council, under the direction of the Association Governance committee will review, measure progress and possibly modify the plan as it prepares for the upcoming twelve months, taking into account what has been and what still needs to be accomplished according to the Strategic Plan.

Larry R. Chambers
EASFAA President 2006-2007

Strategic Long Range Planning Committee:

Dave Myette Co-Chair
John View Co-Chair
Rachel Brinkley
Dino Koff

Mission

The Eastern Association of Student Financial Aid Administrators (EASFAA) provides a community for its individual members and member associations to share ideas and experiences related to student financial aid. The Association strives to prepare its members to ethically and competently serve the students, parents and institutions they represent.

The Association is committed to promoting financial aid programs and to supporting and providing professional development activities that embrace the sound principles and practices of student financial aid administration. The Association is also committed to facilitating communication among its members and acting as an advocate for regional policy with the U.S. Congress and the National Association of Student Financial Aid Administrators (NASFAA).

COMMUNICATION

Effectively communicating EASFAA's services and activities as well as regional and national financial aid issues is critically important. The newsletter, website and electronic bulletins are appreciated by members, but there is always a need to provide clearer and more direct information about how the organization functions and how to participate.

GOALS

1. Improve frequency and quality of communication with members.
2. Find ways to reach non-members in the EASFAA region.
3. Find ways to target communications to new members.
4. Monitor the effectiveness of the newsletter.
5. Review all other existing communication modes (web, volunteer forms, training materials, speeches by president and president elect or other representatives of EASFAA, broadcast messages, etc.).
6. Identify an EASFAA information niche.
7. Enhance EASFAA's presence at the National level.
8. Improve the "marketing" of EASFAA to members and non-members.

ACTIONS

Goal 1:

- A. Provide monthly "EASFAA update" for state association newsletters.
- B. Provide more legislative alerts throughout the year.
- C. Streamline communication messages and media, using the most appropriate method(s) - e-mail, broadcast, website, newsletter.

Goal 2:

- A. Create separate "EASFAA Kits" for new members and new council members.
- B. Improve the volunteer process and communicate it clearly, including valuing participation of new members, providing better committee descriptions, and developing a follow-up process to acknowledge those who were not selected.

Goal 3:

- A. Create a Communication Task Force chaired by the EASFAA Secretary to review all modes of communication.
- B. The task force will report its findings and make recommendations to the EASFAA Council.

Goal 4:

- A. Encourage state representatives to bring information to and seek suggestions from constituents.
- B. Focus on being inclusive and welcoming to current and potential members.

CONFERENCE

The EASF AA conference is structured to provide members with a positive professional experience that is geographically accessible and affordable. Some constituencies, however, could be better served by the conference - specifically graduate, proprietary, multicultural and the more "seasoned" aid administrators.

GOALS

1. Provide workshop sessions, social and networking events that will increase member's satisfaction with the annual conference.
2. Increase participation and attendance.
3. Solicit participation and involvement from the entire EASF AA Council.
4. Provide a vehicle for vendors to interact with conferees at a level and frequency that is satisfactory to all.
5. Provide quality educational programming to the membership for both professional and personal growth.

ACTIONS

Goal 1:

- A. Solicit feedback at each annual conference.
- B. Involve and identify new members by inviting them to a new member event, and providing an overview of the association, either at that event or separately (perhaps a session titled "EASF AA 101").
- C. Solicit speakers and session ideas from outside of EASF AA. And outside of our profession

Goal 2:

- A. Provide frequent, more consistent and up-to-date information about the upcoming conference using both paper and electronic methods.
- B. Evaluate registration fees annually, compare to other regional conference fees, and investigate the cost structure to consider discounts for multiple school attendees and separate vendor registration fees.
- C. Review site selection process and make an evaluation on holding EASF AA in areas where the use of multiple hotels is minimal

Goal 3:

- A. Outline and distribute to council their responsibilities 30 days prior to the conference.
- B. Identify and recognize individual member states at the conference.

Goal 4:

- A. Provide dedicated exhibit visiting times throughout the conference to increase vendor contact with attendees.
- B. Solicit feedback from vendors, perhaps via a separate conference evaluation.

Goal 5:

- A. Solicit ideas from the membership on topics of importance for training and development.
- B. Review issues of national, regional, and state importance for inclusion in the conference agenda.
- C. Solicit speakers who are known experts in their specific areas.
- D. Provide topics of interest to specific constituencies - graduate schools, minority members, distance education, etc.
- E. Provide the opportunity for attendees to have e-mail access free of charge.

FEDERAL RELATIONS

EASFEE members believe it is extremely important for the association to conduct outreach to elected officials. There is a clear need to increase EASFEE's current efforts in this area and make sure members are informed and encouraged to participate in the political outreach process.

GOALS

1. Recommend and promote EASFEE leaders and members to contact elected officials periodically on financial aid issues
2. Promote EASFEE members' role in the higher education community.
3. Increase EASFEE members' awareness of their potential impact on legislative issues.

ACTIONS

Goal 1.

- A. Move the EASFEE website links to elected officials to the opening page
- B. Use broadcast e-mails to direct members to respond on issues
- C. Empower conference attendees to respond to elected officials by making computers available at the conference for their use
- D. Conduct an annual conference session on Legislative Advocacy
- E. Hold one EASFEE Federal Relations Committee meeting a year in Washington DC to use as a springboard for visits to the Hill
- F. Provide EASFEE members the assistance necessary to electronically contact their pertinent elected officials on financial aid issues

Goal 2:

- A. Communicate to members the importance of and avenues for participating in the broader higher education community.
- B. Link together Federal Relations Committees at the State, Regional and National level.
- C. Encourage and facilitate communication to elected officials and other key players in Washington.

Goal 3:

- A. Empower the membership to become active and knowledgeable regarding legislative affairs by providing bulletins on issues and suggesting actions.
- B. Make sure bilingual materials are available to members in Puerto Rico and the Virgin Islands.
- C. Prepare a background paper identifying legislative issues and frameworks for the next 2 years.

FINANCE and DEVELOPMENT

EASFAA members recognize the importance of a sound and fiscally stable EASFAA as well as the importance of fundraising and development. There is a clear need, however, to make financial information about EASFAA more available and understandable to members.

GOALS

1. Clearly define and earmark EASFAA's financial plan.
2. Identify a plan for the use of EASFAA's reserve, including a "disaster plan" to insure the association could survive and provide essential services to the membership.
3. Insure EASFAA's financial status with a well defined financial safeguard system

ACTIONS

Goal 1:

- A. Review and analyze the sources of revenue for appropriateness, balance and stability.
- B. Examine the role of Development, including EASFAA's dependence on external funding sources, the level of support for the annual conference, marketing to vendors and reflecting development goals in the annual budget.
- C. Provide to the EASFAA membership an annual fiscal report of income, expenses and assets

Goal 2:

- A. Review the use of the reserve for effectiveness and efficiency.
- B. Insure that we are operating as a non-profit organization.
- C. Determine the percentage of the annual operating budget that must be held in reserve to insure EASFAA could provide governance, training and an annual conference if we lost a significant source or sources of revenue.

Goal 3:

- A. Annually review the check and balance system in place to insure and protect against fraud, theft and abuse.
- B. Review Fiscal Policies and procedures each year

GOVERNANCE

An all-volunteer association offers special challenges while at the same time providing opportunities for those elected to serve the membership in a leadership capacity. As the organization matures, EASF^{AA} *must* learn from the past and look for new efficient and effective ways to conduct business.

GOALS

1. To promote and provide leadership opportunities for EASF^{AA} members.
2. Improve communication with members.
3. Continue to review the effectiveness of our governance structure and Strategic Plan

ACTIONS

Goal 1:

- A. Through member states, identify and encourage emerging leaders
- B. Provide leadership training opportunities

Goal 2:

- A. Use a Communications Task Force to promote timely information
- B. Provide monthly "EASF^{AA} update" for state association newsletters.

Goal 3:

- A. Annually review officer responsibility manual.
- B. Annually review and update the Constitution and By-Laws.
- C. Monitor, review and report on statues of Strategic Plan.

GRADUATE AND PROFESSIONAL CONCERNS

Financial aid professionals serving graduate and professional students need more training opportunities and the chance to meet to share information and experiences.

GOALS

1. Increase opportunities for participation by graduate and professional aid administrators.
2. Seek guidance and information from the graduate and professional constituency of challenges confronting that group and how legislative, demographic and economic changes affect them.
3. Insure that EASF AA communications include the graduate and professional sector.

ACTIONS

Goal 1:

- A. Include sessions at each annual conference that are specific to graduate and professional issues.
- B. Insure council and committee participation by representatives from graduate and professional schools.
- C. Provide resources as needed to assist with special projects

Goal 2:

- A. Continue to provide training for the graduate and professional members by various workshops.
- B. Provide training for EASF AA members who do not work with graduate students to help them understand and assist their students in the transition to graduate school.

Goal 3:

- A. Solicit articles from graduate and professional aid administrators.
- B. Review the symposium highlights in the newsletter in a similar fashion to the way the conference is covered.

LEADERSHIP DEVELOPMENT

EASFAA is committed to providing opportunities to attract “new leaders with vision” to the organization, to leadership roles and needs to find ways to attract, identify and involve members with leadership qualities and talent.

GOALS

1. Promote leadership development at the regional level.
2. Encourage emerging leaders to continue on leadership track.
3. Provide resources to recruit and identify leaders.

ACTIONS

Goal 1:

- A. Send the EASFAA president or another officer to member state board meetings in addition to state conferences.
- B. Promote and support inter-regional visits by state representatives to other state conferences.
- C. Host an event at NASFAA for EASFAA members each year.
- D. Offer at least one Leadership session at the EASFAA conference
- E. Provide mentoring, both informally and formally.
- F. Continue the EASFAA Leadership committee and its newsletter.

Goal 2:

- A. Establishing an EASFAA leadership workshop for all state officers.
- B. Establish a leadership development plan, with a role for EASFAA council.
- C. Identify emerging leaders, encourage them, and formally recognize their work.
- D. Offer scholarships to attend the EASFAA conferences and the NASFAA leadership conferences.
- E. Develop strategies to encourage younger members of the profession to participate via committee work, state involvement and eventually to seek leadership positions in EASFAA.

MEMBERSHIP

The activities and events provided by EASF AA are to serve the members and their students and organizations. EASF AA should be serving more financial aid professionals in the region.

GOALS

1. Increase membership to include all professional staffs in member states.
2. Maintain and retain membership.
3. Use technology to enhance membership renewal and communications

ACTIONS

Goal 1:

A. Conduct outreach to non-members using the technology available to EASF AA.

Goal 2:

A. Conduct an EASF AA membership survey to receive feedback on current EASF AA membership offerings and their value.
B. Encourage feedback from members and non-members on an ongoing basis.

Goal 3.

- A. Identify within each member state those individuals who are not members and directly market them.
- B. Using the data gathered in A, conduct a survey as to why people choose not to join
- C. Develop from B, a rationale and realistic EASF AA membership goal

MULTICULTURAL DIVERSITY

An understanding of and sensitivity to multicultural diversity issues are important for all financial aid professionals. EASFAA's standing committee has provided numerous pre-conference events that were successful. There is always a need to provide training and information in this area to the entire membership

GOALS

1. Sensitize and educate membership to diversity issues: range, scope, impact and importance.
2. Promote the increase for opportunities for participation by specific groups within EASFAA membership and the financial aid profession as a whole.
3. Learn from various constituents/sectors of opportunities, challenges, and rewards of understanding the upcoming changes in higher education.

ACTIONS

Goal 1:

- A. Extend multicultural diversity pre-conference into regular conference activities.
- B. Incorporate tracks on specific segments/sectors within conference agenda.
- C. Promote EASFAA training on diversity issues.
- D. Expand the vocabulary of diversity in publications, documents and communications.
- E. Provide feature articles on diversity in the EASFAA Quarterly.
- F. At the conference, general session speakers/topics should reflect diversity educational needs.
- G. At the conference, offer follow-up sessions to general sessions on diversity issues to encourage dialogue.

Goal 2:

- A. Request individual members in EASF AA region to identify ethnicity, school type, etc.
- B. Ensure council and committee participation by diverse members/groups (Consider NASFAA model of committee structure and selection process).
- D. Intensify mentoring activities for underrepresented groups - include committee and council members.
- E. Find ways to change EASF AA's image of a closed group.
- F. Find ways to integrate all EASF AA members at association activities.

Goal 3:

- A. Develop an organizational climate that foster inclusiveness.
- B. Accept that "traditional" education has changed. Learn from participants how we can survive and thrive in a new era.
- C. Develop niches in training, conferences, etc. for specific populations, and offer activities in decentralized locations.

TRAINING

Providing training in partnership with NASFAA has been a good model for EASFAA. Members, though, clearly want more training opportunities to take place in the region. Topics of interest include novice training, “hands-on” training, technology, graduate aid, proprietary school aid, and training on diversity issues.

GOALS

1. Promote and enhance members' skills, competency and professional development.
2. Foster cooperation between states'/territories' training resources.
3. Improve the effectiveness of EASFAA's training programs.
4. Develop a training operations manual.

ACTIONS

Goal 1:

- A. Continue to use NASFAA training modules and be proactive in suggesting that NASFAA develop training models that address specific legislative, regulatory, public policy and philosophical issues.
- B. Develop EASFAA training modules and/or identify other resources for training - especially when the NASFAA modules do not address our needs.
- C. Promote professional development modules to address topics such as enrollment management, institutional survival skills, organizational skills, and understanding organizational models.
- D. Promote interaction with other higher education associations - bursars, registrars, etc.

Goal 2:

- A Use state training chairs to serve on the EASFAA Training Committee.
- B. Explore and implement establishing reciprocal agreements between states to offer training opportunities to EASFAA members and avoid the duplication of efforts.

Goal 3:

- A. Develop a full training committee that would include several individuals who would not be the EASF AA trainers that year to assist with administrative tasks.
- B. Use technology to effectively communicate to the EASF AA membership the training opportunities within all EASF AA member areas and the country.
- C. Use technology to deliver training in the highest standards possible at a reasonable cost.

Goal 4:

- A. The manual would define the roles of committee chair, site coordinators, trainers, and other committee members.
- B. The manual would suggest a timeline for annual training and will provide the schedule for Fall and Spring training by the Council's Fall meeting.
- C. The manual would contain procedures for selecting training topics, training trainers, and communicating about events to members.
- D. The manual should assist in establishing an EASF AA clearinghouse and an overall calendar of EASF AA and EASF AA member states training programs

CONCLUSION

EASFAA's Long Range Strategic Plan has been updated for the fourth time. EASFAA elected officers, state representatives, committee chairs, past presidents and members of the organization all made significant contributions to the goals and actions presented here. The members who responded provided invaluable input for the organization. This plan addresses areas of responsibility and activity for the organization. Over the next five years, EASFAA Council will refer to this document to guide decisions and activities. Furthermore, all EASFAA committees will be assigned specific goals for those committees to work on and achieve in any given year.

Appendix A

EASSFAA Strategic Long Range Plan

2007-2012

Environmental Scan

Issues to consider:

Politics.

- The 2006 election has changed the majority in Congress from Republican to Democrat.
- What will happen in the 2008 elections? Will the President be a Republican or a Democrat? Will the Democrats continue to control the Congress?
- Will budgetary pressures from the war in Iraq and desires for tax cuts continue? What steps will organizations such as EASFAA need to take in order to effectively educate legislators on the need for investment in human capital that includes access to postsecondary education for those from low income families, and affordability for those from middle income families?

Old issues, new focus:

- Access vs. affordability.
 - We can expect continued public demand from middle and upper class for more affordability of the cost of a postsecondary education.
 - Challenges to affirmative action will likely continue. How do we insure that the benefits of a postsecondary education are shared by all members of society, without regard to race, ethnicity, religion, gender, physical/mental challenges or sexual orientation?
 - The demographics of the American public will change. How will federal, state, and private student aid programs respond in terms of program eligibility and funding? For example, is the exclusion of non-citizens from ACG/Smart Grants the start of a new trend?

- Public attention is increasingly focused on the levels of student indebtedness.
 - New research suggests the 8% rule of thumb for repayment is not adequate. It's too low for higher earning students and too high for those in low paying jobs.
 - The public focus has led to interest in ethical issues regarding lender incentives to schools and the marketing of student loans.

- Simplification of the FAFSA.
 - This is a popular sound bite, but will there actually be fewer questions?
 - The potential of reducing the economic justification of distribution formulas could further erode need analysis and move the financial aid system in the direction of rationing of funds.
 - How much “slop” are we willing to accept in the need analysis system? How much is Congress and the public willing to accept? Are we willing to accept that some percentage of funds may go to students who are “eligible” but not “needy”?
 - Can we phase out the paper form? How real is the digital divide, and will we disenfranchise some groups of students in order to gain efficiency?

- Enrollment management and tuition leveraging.
 - This is now receiving negative publicity in the media. Will this publicity force changes in how colleges award institutional funds, or erode confidence in colleges and financial aid administrators?
 - The continuing growth of computer systems to manage aid at the campus requires changes in the skill sets of professional and clerical staff. The emphasis seems to be shifting from people skills to technical skills. How do we maintain our role as counselors/advisors while managing complex systems? Are we drifting away from our roots in access and choice, toward technology? The demands placed on campus staffs to “make it work” impose new levels of stress that affect the well-being of our members and their families, and limit the ability of members to participate as volunteers and leaders in EASFAA.

- Continuing complexity of regulations.
 - Are we asking too many questions, looking for an “official” answer to every possible situation? Is that the avenue to being professional? Are we losing our ability to “interpret” regs when we constantly seek the “right” answer?

New issues, new concerns

- New federal programs have been created, and more may be created in the future.
 - How does EASFAA effectively advise the Congress on the best way to achieve their goals in supporting postsecondary education while ensuring that financially needy students receive the funds needed to pay for a postsecondary education and while limiting the burden of managing these programs.
 - How does EASFAA effectively train its members to properly administer such programs?
- Tax credits bypass the financial aid system, and don't necessarily target money to the neediest. Can these be modified to be more effective?
- ACG and SMART grants have fragmented the federal aid system through their emphasis on academic merit, specific curriculums, and citizenship. If students choose to "follow the money", what are the implications for the United States in terms of recruitment to nursing and allied health, teacher education, or other equally critical national needs? In addition, the administration of these programs has created a whole new bureaucracy of regulations and procedures. On a positive note, these programs are entitlements. Does this offer the possibility of Pell Grants finally becoming an entitlement? How can EASFAA advocate for better, more effective programs?
- No Child Left Behind (NCLB) raises three concerns.
 - First, as the Congress works to reauthorize this program over the next year or two, it will detract from the needs of postsecondary education. HEA reauthorization has been postponed for some time now. What are the implications of this?
 - Second, will Reauthorization focus the question of accountability of postsecondary education? Issues such as the percentage of students graduating in a given amount of time, and what those students have learned, may take on new life.
 - Third, to the extent that NCLB is successful at the K-12 level, it will produce an increased number of college ready students, potentially raising the competition for admission. More importantly from our point of view, will financial aid funding levels increase to meet the needs of this additional population?

Membership issues

- The demographics of our membership are changing. A majority of our members are female. What new services can EASFAA offer to help these members?
- How do we insure participation by all, regardless of gender, race, religion, culture, sexual orientation, or disability in our Association?
- Our States continue to be our primary interface with many of our members. How do we insure adequate participation in EASFAA activities to continue this?
- New methods of communication are developing at a rapid pace. Webinars, blogs, podcasts and such are only a few of the most recent. How can these and other new technologies be integrated into EASFAA's training, its communication with members, and its communication with students and the public?
- There is the reality of potential new regulation in the area of Lender/School relations and inducements. What will these possible new rules look like and will they impact EASFAA's relationship with its many business/vendor partners?

Campus aid administrators are expected to do much more than just administer financial aid programs. We are involved in family financial planning, credit counseling, debt management strategies, and income tax planning. We leverage funds, assist in fund raising and development, operate complex software programs, and stay abreast of legislative developments and program regulations from federal and state agencies. We are an integral part of the enrollment management team at the campus. We communicate with students in a multi-tasking and multi-media format through print, email, webpages, IM, blogs and ipods. While doing all of this we remain counselors and advisors to students. How does EASFAA help train its members to be effective financial aid administrators in the 21st century? Are these same services appropriate for our associate members, or should other services be offered?