



# EASFAA Long Range Strategic Plan – 2022-2025

Approved by Executive Council  
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<b>EASFAA Long Range Strategic Plan – 2022-2025</b>	1
Vision Statement	2
Mission Statement	2
Diversity Statement	2
Purpose from By-Laws and Articles of Incorporation	2
Previous EASFAA Long Range Strategic Plan Update (2019-2022)	3
Introduction to EASFAA Long Range Strategic Plan (2022-2025)	3
<b>Strategic Goals</b>	4
Training and Professional Development	4
Volunteer and Association Leadership Development	5
Diversity and Inclusion	6
Enhanced Public Footprint	7
Member Experience	8
Strategic Planning Committee Members	8
Additional Notes	9
Environmental Scan Summary	9
Best Practices and Ongoing Activities	11

## **Vision Statement**

EASFAA aspires to be the leader in the development of empowered financial aid professionals.

## **Mission Statement**

EASFAA promotes and supports the advancement of its members in higher education utilizing training, advocacy, and leadership development opportunities.

## **Diversity Statement**

In support of the EASFAA mission, EASFAA seeks, accepts, and practices the inclusion of all individuals in the association regardless of race, ethnicity, age, gender, gender identity, religion, sexual orientation, disability, appearance, professional level, institutional type, country of national origin or other uniquely defined characteristics.

## **Purpose from By-Laws and Articles of Incorporation**

The Association shall be organized as an educational and charitable organization within the meaning of Section 501(c)(6) of the Internal Revenue Code. Within this general limitation, the specific purposes of the Association shall be:

- A. To serve the needs and interests of students, faculties, and administrations of institutions of postsecondary education, as well as individuals and public and private organizations whose activities are related to the support and/or administration of student financial aid, by providing advice, training, and other assistance in the promotion, development, and administration of effective student financial aid programs.
- B. To promote and facilitate communications between institutions of postsecondary education and the sponsors of student aid funds.
- C. To stimulate, promote, and conduct systematic studies and research, cooperative experiments, education, conferences, and such other related activities as are desirable or necessary in fulfilling the purposes of the Association.
- D. To promote professional standards for the preparation, appointment, effectiveness, recognition, and association of student financial aid administrators and counselors in institutions of postsecondary education and other public or private organizations whose activities are related to the support and/or administration of student financial aid.
- E. To serve as a forum and action body to advise and recommend programs and policies of related agencies, both regional and national, dealing with student financial aid.

## **Previous EASFAA Long Range Strategic Plan Update (2019-2022)**

In developing the 2019-2022 EASFAA Long Range Strategic Plan, there was significant effort and collaboration with the membership. In addition to surveying the membership and incorporating their feedback, leadership also led open forums with the membership to gain valuable insight that was used to complete a major rewrite of the plan. Given the unforeseen changes in the industry and the world as a whole which are described below, membership feedback was again solicited, along with a scan of industry best practices, in order to revise and enhance the strategic plan to best reflect both the needs of the financial aid community and the “new normal” as a result of the COVID-19 pandemic.

In summary, the goals largely remain similar while at the same time providing a new and defined focus of the strategies and objectives on which EASFAA will focus for the next three years.

## **Introduction to EASFAA Long Range Strategic Plan (2022-2025)**

Since the last strategic plan, the world has faced a pandemic which has caused EASFAA and other professional associations to utilize virtual training events and conferences. Colleges and universities around the country had to also adjust the learning and work environments for our students.

For EASFAA to support its members through the next three years, a new strategic plan, designed with known challenges in mind, is needed. The Strategic Planning Committee has performed an environmental scan to obtain a better understanding of the issues surrounding our community. EASFAA is well-resourced to continue its long history as a valuable partner to its members. The significant financial strength of the Association, the dedication of our members to professional association longevity and impact, and EASFAA’s long-standing reputation for providing high-quality and relevant training for members are assets this strategic long-range plan seeks to leverage. The Strategic Planning Committee encourages future EASFAA leaders to:

1. Leverage EASFAA’s assets, in particular the financial resources of the Association, by developing a thoughtful plan to align the use of a portion of the reserves with accomplishing the goals outlined in this plan.
2. Use this plan and the companion implementation framework as an integral part of the daily management of the association, including updating documented policies and procedures to reflect the need to conduct regular check-ins on progress towards meeting the goals outlined.

Given the increasingly volatile nature of the postsecondary education sector, the Committee further recommends that future leaders react to changes in the environment and ensure that the plan is responsive to members’ needs.

# Strategic Goals

1. **Training and Professional Development**
2. **Volunteer and Association Leadership Development**
3. **Diversity and Inclusion**
4. **Enhanced Public Footprint**
5. **Member Experience**

## 1. Training and Professional Development

- 1.1. **Strategy:** Provide robust and relevant training opportunities to the membership and foster collaborative training opportunities among member states through both in-person and webinar training.

**Tactics:**

- 1.1.1. Continue to use evaluation feedback, membership surveys, and national trends to develop training topics and programs.
  - 1.1.2. Continue robust training opportunities through various outlets such as: Annual Training, EASFAA Leads, NASFAA Credentials, and Tuesdays @ 2 Webinars.
  - 1.1.3. Evaluate and assess member engagement and feedback in training events.
  - 1.1.4. Focus and respond to the unique needs of our membership and the different strengths and needs of our member states.
  - 1.1.5. Reinvest in graduate/professional training and symposia.
  - 1.1.6. Provide training relevant to enhanced leadership skills such as project management.
  - 1.1.7. Explore and invest in new and evolving training modalities.
  - 1.1.8. Explore and invest in high-quality and paid (when needed) trainers.
- 1.2. **Strategy:** Develop and maintain a training track dedicated to Diversity & Inclusion. (See also 3.2)  
**Tactics:**
    - 1.2.1. Include Diversity & Inclusion training at the Annual Conference and through EASFAA Leads, Tuesdays @2, and Annual Training.
    - 1.2.2. Collaborate effectively with NASFAA's Diversity & Inclusion training and initiatives.
    - 1.2.3. Pursue opportunities to partner with EASFAA state and other regional associations on diversity and inclusion training initiatives.
- 1.3. **Strategy:** Provide an annual conference that rotates throughout the states in the region.  
**Tactics:**
    - 1.3.1. Provide a program that includes relevant and rich training opportunities.

- 1.3.2. Provide opportunities for networking and relationship building.
- 1.3.3. Engage our membership with our vendor sponsors to share information about products and services.

**1.4. Strategy:** Provide financial aid leadership development opportunities.

**Tactics:**

- 1.4.1. Pursue opportunities to partner with NASFAA on leadership development and succession planning initiatives. For example, sponsor attendees to NASFAA's Leadership and Legislative Conference (based on tracks offered e.g. succession planning, and/or other professional development tracks).
- 1.4.2. Pursue opportunities to partner with EASFAA state and other regional associations on leadership development and succession planning initiatives. (e.g. inter-regional visits, cross-association presentations).
- 1.4.3. Provide opportunities to increase Certified Financial Aid Administrator (FAAC®) and NASFAA credentials among EASFAA members.
- 1.4.4. Continue and enhance EASFAA Leads, which provides training on leadership and management topics. (See also 1.1.2 and 2.1.4)
- 1.4.5. Explore the feasibility and potential impact of new EASFAA led professional development initiatives, such as internships, leadership coaching, and/or facilitated project planning teams to aid in succession planning.

## 2. Volunteer and Association Leadership Development

**2.1. Strategy:** Provide association leadership development opportunities.

**Tactics:**

- 2.1.1. Identify and encourage potential leaders who are prepared to take leadership roles and cultivate the use of their abilities.
- 2.1.2. Develop an evaluation tool to identify those with leadership abilities and provide opportunities for association involvement.
- 2.1.3. Create various avenues for leadership development.
- 2.1.4. Continue and expand the Leadership Track for the annual conference that ties into EASFAA Leads. (See also 1.1.2 and 1.1.4)
- 2.1.5. Allow students to sign up for membership and encourage participation.

**2.2. Strategy:** Expand mentoring opportunities.

**Tactics:**

- 2.2.1. Develop mentoring opportunities for new members.
- 2.2.2. Provide mentor training and resources.
- 2.2.3. Develop a series of webinars dedicated to members new to the profession.

**2.3. Strategy:** Create volunteer opportunities in order to build a pipeline.

**Tactics:**

- 2.3.1. Work to expand committee involvement and participation.
- 2.3.2. Engage volunteers in task forces/ad hoc committees to complete initiatives in a timely and focused manner.
- 2.3.3. Build succession strategies into committees, developing future, prepared leadership.

- 2.4. **Strategy:** Create opportunities to fully engage EASFAA Executive Council state representatives. (See also 4.3)

**Tactics:**

- 2.4.1. Build, implement, and sustain a consistent Executive Council onboarding experience for new state representatives.
- 2.4.2. Create networking opportunities for state representatives to collaborate and share best practices in state association leadership.
- 2.4.3. Evaluate opportunities for state representatives to participate in standing and/or ad hoc EASFAA committees.

### 3. Diversity and Inclusion

- 3.1. **Strategy:** EASFAA Executive Council and committees should be reflective of the diversity of the organization.

**Tactics:**

- 3.1.1. Increase membership and volunteerism from diverse populations.

- 3.2. **Strategy:** Continue and expand the training track dedicated to Diversity & Inclusion. (See also 1.2)

**Tactics:**

- 3.2.1. Include Diversity & Inclusion training at the Annual Conference and through EASFAA Leads, Tuesdays @2, and Annual Training.
- 3.2.2. Collaborate effectively with NASFAA's Diversity & Inclusion training and initiatives.
- 3.2.3. Pursue opportunities to partner with EASFAA state and other regional associations on diversity and inclusion training initiatives.
- 3.2.4. Secure experts to address and facilitate discussion on relevant diversity and inclusion topics.

- 3.3. **Strategy:** Building a mentoring program that focuses on establishing a pipeline to increase diverse membership.

**Tactics:**

- 3.3.1. Provide opportunities for each member state association to sponsor or recommend potential committee members and/or committee chairs.

3.3.2. Engage specifically with HBCUs and MSIs in the region.

3.4. **Strategy:** Increase the diversity of speakers and presenters.

**Tactics:**

3.4.1. Seek out and secure diverse speakers and presenters for both in-person and virtual events.

3.4.2. Provide coaching and/or mentoring to diverse subject-matter experts to encourage sharing expertise as presenters and/or trainers.

3.4.3. Evaluate opportunities to sponsor NASFAA credentials for diverse subject-matter experts. (See also 1.4.3)

3.4.4. Secure experts to address and facilitate discussion on relevant diversity topics with the EASFAA Executive Council.

#### 4. Enhanced Public Footprint

4.1. **Strategy:** Actively establish partners on advocacy.

**Tactics:**

4.1.1. Collaborate and strategize with NASFAA when appropriate.

4.1.2. Partner with NASFAA on the Advocacy Pipeline efforts.

4.1.3. Actively communicate and work with state association presidents and/or federal advocacy committee chairs.

4.1.4. Utilize Executive Council leadership on direct engagement with ED and legislative staff.

4.2. **Strategy:** Engage, inform, and empower membership on advocacy.

**Tactics:**

4.2.1. Poll members for “hot button” or topics of interest on advocacy.

4.2.2. Prepare and distribute briefing materials related to topics of interest to the association.

4.2.3. Provide listening or strategy sessions on topics of interest to the association.

4.2.4. Provide resources to help develop advocacy skills and involvement.

4.3. **Strategy:** Strengthen member-state relationships. (See also 2.4)

**Tactics:**

4.3.1. Create networking opportunities for state representatives to collaborate and share best practices in state association leadership.

4.3.2. Facilitate inter-state collaboration such as providing networking opportunities for member-state committee chairs.

## 5. Member Experience

5.1. **Strategy:** Improve the membership experience.

**Tactics:**

- 5.1.1. Launch annual membership renewal drive, including encouraging full use of institutional membership and outreach to define the value of membership.
- 5.1.2. Evaluate, plan, and implement expanded membership functionality.
- 5.1.3. Ensure that membership application/database captures all desired demographics about institutions and members, e.g. full sector list.

5.2. **Strategy:** Provide enhanced communication functionality to members.

**Tactics:**

- 5.2.1. Create an enhanced communication platform for member engagement.
- 5.2.2. Provide opportunities for new and seasoned member engagement.

## Strategic Planning Committee Members

James T. Anderson, Montclair State University (President)

Howard Leslie, Berkeley College (Chair, Strategic Planning)

Danette Burgess, American University (Chair, Diversity & Inclusion)

Larry Chambers, Financial Aid Services (Past President)

Thomas Dalton, Edamerica (Past President)

Tony Erwin, Blue Icon Advisors (Past President)

Kristi Jovell, Middlebury College (Past President)

Taylor Kreutter, Roberts Wesleyan College (Co-Chair, EASFAA Webinar Series)

Kelly Morrisey, Community College of Rhode Island (Past President)

Shawn Morrisey, University of Massachusetts Medical School (Past President)

Samantha Veeder, University of Rochester (Past President)

Douglas Wilson, Delaware State University (Treasurer)

Wynette Zuppardi, Brown University (Past President)

## Additional Notes

### Environmental Scan Summary

#### COVID-19

As the members of the Strategic Planning Committee work to finalize this plan in early 2022, we note that the last two years have been difficult for students, financial aid administrators, and institutions. We are entering the third year of the COVID-19 pandemic. There has been significant positive change in the last two years, including innovation in business processes and student services, virtual events, ongoing work from home opportunities for aid professionals, and a renewed understanding of the importance of experienced aid professionals at many institutions. Financial aid administrators have had to continually pivot over the last two years and did so incredibly fast. Among the many resources that aid administrators relied on, NASFAA stood out as a key partner. Challenges persist, however, including the potential impact of new COVID-19 variants and the possibility of additional lock downs. Financial aid professionals are being asked to do more than ever before, often with less resources due to budget cuts and a growing wave of aid professionals leaving the field. The “new normal” is yet to be defined. It is both with a sense of accomplishment and a sense of concern that the Committee sought to draft a plan to guide EASFAA’s work for the next three years. As the Committee gathered and reflected on members’ needs, it became clear that EASFAA is well-positioned to help members thrive. The resulting plan reaffirms current strategic initiatives and suggests action in new or expanded ways.

### Membership Survey Summary

The Strategic Planning Committee distributed a survey to current and lapsed members during the fall 2021. A total of 182 individuals began the survey and 68 completed most questions. 66% of the respondents had more than eleven years of experience in financial aid. However over 50% had been EASFAA members less than five years, this may be the result of the introduction of institutional membership.

Training: The survey consistently reports that training is paramount to the membership and EASFAA is doing it well. EASFAA should continue its commitment to training, as well as explore new training options. There were several respondents requesting additional NASFAA credential training and review courses for the NASFAA Certified Financial Aid Administrator program; this may be a possible partnership with NASFAA for the future.

Conference: The majority of respondents are fine with the timing of the conference in May and indicated interest in returning to an in-person conference.

Mentoring: Mentoring is a priority to the membership; mentoring should be a focus of the strategic plan.

Other: Government Relations and advocacy were mentioned frequently, especially with regards to state/regional partnerships. The Graduate/Professional listserv and activities were also deemed important.

## Reauthorization

Reauthorization of the Higher Education Act of 1965 is now approaching 10 years late. Timing for reauthorization remains uncertain in a political environment that has never been more contentious. The financial aid community continues to deal with legislative and regulatory concerns that constrain the ability to effectively administer the Title IV Federal Student Aid programs. The plan created by the Committee did not make reauthorization a priority. It will come when it comes and the Committee believes that the investments recommended to strengthen the Association and its members will be the foundation needed to address what comes in an eventual reauthorization.

## Technology

Technology continues to change every day. Many schools have the ability to keep up. The Committee notes concern for those institutions that might not be able to adjust to these changes, which would directly impact students. We believe enhanced training, provided by EASFAA or in partnership with NASFAA, other regions and member states, will become more and more relevant.

## **Best Practices and Ongoing Activities**

This section reviews goals from the 2019-2022 Strategic Plan that have already been accomplished. The Committee notes that these activities/practices should continue.

### **Training and Professional Development**

1. EASFAA has become renowned for its webinar series. The Committee highly recommends that this continue.
2. The new Strategic Plan includes expansion of training

### **Conference**

1. EASFAA has always offered conferences. This goal was primarily concerned that we do a better job rotating the sites. The Committee notes that this has been accomplished and that it is definitely something that should continue.

### **Diversity and Inclusion**

1. EASFAA has accomplished much to foster diversity and inclusion, due to the efforts of the Diversity and Inclusion Committee and with support from NASFAA. Diversity and inclusion must remain a primary focus for the Association.
2. The new Strategic Plan includes expansion of initiatives to support diversity and inclusion.

### **Volunteer Opportunities**

1. EASFAA has done well by expanding committee involvement and participation.
2. This Strategic Plan supports this accomplishment in almost every recommended goal.

### **Organizational and Fiscal Responsibilities**

1. The switch to a hybrid model, including an institutional membership option, was extremely well thought out and executed and contributed to a tripling of the membership base.
2. The opportunities created by the fiscal strength of the Association are addressed in the new Strategic Plan through suggestions that would spend association funds in ways that support the membership. At the same time fiscal responsibility must always continue.
3. The prior strategic plan focused on developing detailed procedures for the Vice President and Treasurer. This was accomplished, though the Committee notes that there should be an annual review of all Policies and Procedures.