

EASFAA Long Range Strategic Plan –2019-2022

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 identify, 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 post-secondary 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 post-secondary 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 post-secondary education and other public or private organizations whose activities are related to the support and/or administration of student financial aid.

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.

Strategic Pillars

- **Training and Professional Development**
- **Volunteer and Leadership Development**
- **Diversity and Inclusion**
- **Advocacy and Public Policy**
- **Organizational and Fiscal Responsibilities**

Training and Professional Development

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

Objectives:

- Continue to use evaluation feedback, membership surveys, and national trends to develop training topics and programs.
- Continue robust training opportunities through various outlets such as: Annual Training, EASFAA Leads, NASFAA Credentials, and Tuesdays @2 Webinars.
- Evaluate and assess member engagement and feedback in training events.
- Focus and respond to the unique needs of our membership and the different strengths and needs of our partner states.
- Explore new and evolving training modalities.

2. **Goal:** Develop and maintain a training track dedicated to Diversity & Inclusion.

Objectives:

- Include Diversity & Inclusion training at the Annual Conference and through EASFAA Leads, Tuesdays @2, and Annual Training.
- Collaborate effectively with NASFAA's Diversity & Inclusion training and initiatives.

3. **Goal:** Provide an annual conference that rotates throughout the states in the region.

Objectives:

- Provide a program that includes relevant and rich training opportunities.
- Provide opportunities for networking and relationship building.
- Engage our membership with our vendor sponsors to share information about products and services.

Volunteer and Leadership Development

Goal: Provide leadership development opportunities.

Objectives:

- Identify and encourage potential leaders who are prepared to take leadership roles and cultivate the use of their abilities.
- Develop an evaluation tool to identify those with leadership abilities and provide opportunities for association involvement.
- Create various avenues for leadership development.
- Develop a Leadership Track for the annual conference that ties into EASFAA Leads.
- Allow work-study students to sign up for membership and encourage participation.

Goal: Expand mentoring opportunities.

Objectives:

- Develop mentoring opportunities for new members.
- Provide mentor training and resources.
- Develop a series of webinars dedicated to new members.

Goal: Create volunteer opportunities in order to build a pipeline.

Objectives:

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

Diversity and Inclusion

Goal: EASFAA Board of Directors and Committees should be reflective of the diversity of the organization.

Objectives:

- Increase membership and volunteerism from diverse populations.

Goal: Develop and maintain a training track dedicated to Diversity & Inclusion.

Objectives:

- Include Diversity & Inclusion training at the Annual Conference and through EASFAA Leads, Tuesdays @2, and Annual Training.

- Collaborate effectively with NASFAA’s Diversity & Inclusion training and initiatives.

Goal: Building a mentoring program that focuses on establishing a pipeline to increase diverse membership.

Objectives:

- Each state association sponsor or recommend potential committee members or potential future board meetings.
- Encourage volunteerism

Goal: To increase the diversity of speakers and presenters through training and presenters

Objectives:

- Accessibility Live in-person vs webinars.
- Diversity credentialing piece.
- Bring a diverse speaker to board meeting.

Advocacy and Public Policy

Goal: Actively establish partners on advocacy.

Objectives:

- Collaborate and strategize with NASFAA when appropriate.
- Partner with NASFAA on the Advocacy Pipeline efforts.
- Actively communicate and work with state association presidents and/or federal advocacy committees.
- Utilize Executive Council leadership on direct engagement with ED and legislative staff.

Goal: Engage, inform, and empower membership on advocacy.

Objectives:

- Poll members for “hot button” or topics of interest on advocacy.
- Prepare and distribute briefing materials related to topics of interest to the association.
- Provide listening or strategy sessions on topics of interest to the association.
- Provide resources to help develop advocacy skills and involvement.

Organizational and Fiscal Responsibilities

Goal: To better engage our vendor partners by providing value to their involvement in the conferences, banner ads and in facilitating interactions with members.

Objectives:

- Ensure a suitable space for the vendor room at conferences.
- Educate the membership on the importance of actively engaging the vendors during the conference and throughout the year. Vendor support is essential to the association and their products and services can bring great value to our institutions and students.
- Create opportunities for vendors to showcase their products and services at the conference by setting aside time for presentations in time slots that do not conflict with breakout sessions, general sessions, and social activities.

Goal: To coordinate training opportunities with states offering substantive training programs and provide support for smaller states which may not have the same level of resources.

Objectives:

- To learn the training needs of each state.
- To develop remote training opportunities, using technology such as Skype, seek to hold at least one in-person training event in each state, each year.

Goal: For the Vice President and Treasurer to develop detailed procedures in their management of association finances and in managing the Finance Committee.

Objectives:

- Review existing documents and update them as appropriate.
- To update the existing Policies and Procedures Manual regarding the role of the Vice President and Treasurer.
- Create detailed procedures for e-Commerce transactions, such as for the use of credit cards, and update the P&P to reflect changes due to MemberClicks.
- Develop procedures for the transition of new officers.