



Strategic Plan 2023-2027

Executive Summary

The purpose of this five-year strategic plan is to guide the decision-making of the Executive Council of the California Association of Student Financial Aid Administrators (CASFAA) and to inform the membership of the priorities and activities of the Association. The goal of the plan is to ensure that CASFAA continues to serve its members most effectively and efficiently. CASFAA's fundamental purpose and reason for existence is clearly articulated in the Association's mission statement, vision and core values.

The following six goals summarize the organizational priorities for the Association for the next five years:

1. Serve as a resource for all financial aid professionals in California.
2. Increase association membership engagement to provide a worthwhile and meaningful experience.
3. Advocate for educational access for California's students and serve as an authority in the State on student aid issues.
4. Increase and maintain association membership to continue to meet financial goals and support CASFAA's financial sustainability.
5. Foster inclusion and equip members to assist the diverse populations we serve.
6. Improve preparedness and experience of Executive Council members.

The 2023-2027 CASFAA Strategic Plan was approved by the 2023 Executive Council on 12/16/22

This marked the conclusion of the formal process of developing the strategic plan, but not the conclusion of the Association's strategic planning efforts. In support of the five-year plan, committees and officers must annually develop goals and update the Measures' Tracking Tool. The Strategic Planning Committee will continue to be responsible for ensuring the strategic plan is reviewed and monitored regularly by Executive Council and communicated to the membership of the Association.

CASFAA Mission and Values

Mission:

To provide training and professional development opportunities to the financial aid community and to advocate on behalf of the financial aid profession for student educational access and choice.

Values:

The core values of the Association are:

- *Service*
- *Engagement*
- *Advocacy*
- *Fiscal responsibility*
- *Diversity*
- *Leadership*

<https://www.casfaa.org/vision-mission>

Goals, Measures, and Strategies

CASFEE's Strategic Plan will allow the Association to fulfill its mission and continue to provide members with outstanding services and support. The five goals summarize the organizational priorities for the Association for the next five years.

GOAL 1: Serve as a resource for all financial aid professionals in California.

Measures:

- A. Measure traffic on website pages
- B. Consistent publication CASFEE Chronicle subscription
- C. Track member attendance and participation at annual conference
- D. Training attendance

Strategies:

1. Promote knowledge sharing through expanding website content
2. Establishing regular CASFEE Chronicle communication
3. Send out scheduled communication introducing someone and resources.
4. Re-establish an ambassador program
5. Create a Website maintenance plan.
6. Create communication plan to promote training opportunities in CASFEE Chronicle, social media (facebook), email and promotions of resources at training events.
7. Ensure CASFEE Chronicle Editor position is filled
8. Survey members to determine areas/topics of need to focus training.

GOAL 2: Increase association membership engagement to provide a worthwhile and meaningful experience

Measures:

- A. Increase number of member institutions
- B. Increase member satisfaction
- C. Increase the number of and participation in membership events

Strategies:

1. Send a survey out to gauge needs and wants.
2. Create a position for membership chair- engagement focused
3. Consistent and relevant training by qualified trainers
4. Track participants attendance and put all information in one place so that the membership chair can follow up with them
5. Plan quarterly mixers by region (e.g. in Northern and Southern California) to connect, network and promote CASFAA
6. Community platform or messaging platform to have free form conversations for the state and each region. They could be work related or more. Just to stay connected For example- Slack. Track participation
7. Promote member opportunities at all CASFAA events.
8. Continue to expand training and professional development opportunities to members
9. Promote volunteer opportunities at all CASFAA events.
10. Add feedback survey to all training and CASFAA sessions.
11. Follow up with event participants via email to promote member opportunities.
12. Explore and promote incentives for members.
13. Update materials highlighting the benefits of joining CASFAA
14. Survey members annually to determine satisfaction and type of events.
15. Increase scholarships to events for members and non-members

GOAL 3: Advocate for educational access for California's students and serve as an authority in the State on student aid issues.

Measures:

- A. Increase number of published position papers related to State bills
- B. Participate in all Financial Aid Advisory Board meetings with CSAC
- C. Ensure CASFEE Day at the Capitol is executed annually

Strategies:

- 1. Ensure VP State and Federal issues are filed each year.
- 2. Monitor and track proposed and passed legislation
- 3. Ensure Representatives from each segment are on Federal and State Issues committees.
- 4. Publish and send Federal and State position papers on current bills to Federal and State representatives.
- 5. Highlight advocacy efforts and opportunities in the CASFEE Chronicle and other publications.
- 6. Increase CASFEE membership participation at "Day" at the Capitol.

GOAL 4: Increase and maintain association membership to continue to meet financial goals and support CASFEE's financial sustainability.

Measures:

- A. Increase and maintain institutional membership year over year
- B. Increase and maintain vendor investment year or year
- C. Asset management- Invest in funds that are insulated from economic fluctuations with a proactive approach.

Strategies:

- 1. Increase CASFEE awareness through targeted marketing, engagement focused activities/ onboarding for new members and new EC members.
- 2. Provide seasonal training opportunities for vendors to engage with current and prospective clients.
- 3. Ensure the Treasurer position is filled consistently by an experienced individual.
- 4. Maintain detailed and consistent policies and procedures.
- 5. Cross training.

GOAL 5: Foster inclusion and equip members to assist the diverse populations we serve.

Measures:

- A. Increase training opportunities by offering diversity and inclusion topics at each CASFAA event
- B. All volunteers who deliver content will receive training on diversity and inclusion topics prior to CASFAA events
- C. Increase awareness of diversity and inclusion topics, initiatives, and resources

Strategies:

1. Publish meeting notes on a regular basis on the CASFAA website and link to on CASFAA Chronicle.
2. Create and implement training on topics of inclusion and diversity to all members
3. Review Mission Statement/vision and goals to align with the regional (WASFAA) and national association (NASFAA)
4. Access and Diversity committee present at the annual conference.
5. Closed captioning on webinars
6. Training the trainers: bringing in someone to train the Training committee on unconscious bias, access, diversity and inclusion.

GOAL 6: Improve preparedness and experience of Executive Council members.

Measures:

- A. Increase the satisfaction of Executive Council members
- B. Offer professional development opportunity at each Executive Council meeting
- C. Attrition rates of Executive Council
- D. Survey of EC after each meeting on preparedness (if head of committee, survey committee members for feedback).

Strategies:

1. Implement annual formalized on-boarding process lead by president and president elect to ensure all EC have contacts on-boarding
2. During on-boarding process establish relationship with prior representative
3. Update all EC job positions on the website.
4. Review and update policy and procedures on the website.
5. Review published Bylaws to ensure they include all updates.
6. Survey Executive Board annually on satisfaction and resources
7. Implement off boarding processing collecting feedback on experience to share with the upcoming year EC.
8. Schedule and publish Executive Council meetings and events before the transition

- meeting, when able, to ensure optimal attendance and participation.
9. Document organization history in secure online location to ensure continuity.
 10. Promote Leadership opportunities and experiences within the organization.
 11. Look into ways to promote continuity (e.g. increase federal and state positions from 2 to 3 years, mentor committee members to EC positions).
 12. Mentorship pipeline for leadership roles.
 13. Maintaining relationships with members in other segmental organizations
 14. Receive trainings at each EC meeting to promote professional development within the profession.

Support and Implementation of the Strategic Plan

The Executive Council and each CASFAA Committees will support the plan by its regular use in the decision-making process and implementing new programs

In addition, the following will take place:

- Strategic Planning Committee will review the goals, measures, strategies and Measures' Tracking Tool at each meeting
- Fiscal Planning Committee will review the strategic plan to make informed decisions of financial resources and budget
- Executive Council will affirm strategic plan goals and/or review Measures' Tracking Tool during the Strategic Planning Committee reports at the Executive Council meetings
- Time at the annual transition meeting will be reserved to review the strategic plan
- Committee chairs will review the strategic plan with their committee at the beginning of each year and set committee specific goals
- Committee chairs and officers will report on activities related to the strategic plan on each quarterly report.

Appendix A. Strategic Planning Process Participants

Members of the 2022 Strategic Planning Committee who participated in the development and editing 2023-2027 CASFAA Strategic Plan:

- Bronwyn Garrison
- Veronica Blesoe
- Jesse Marquez
- Christina Tangalakis
- Jim Griffin
- Ricardo Buenrostro
- Wendy Wang
- Jessica Ayers
- Shawn Domingo
- Rachel Mason
- Kevin Roberts
- Jenny Garcia
- Luis Vargas
- David Hillery
- Dewayne Barnes
- Tom Le
- Luanne Canestro
- Thalassa Naylor
- Lori Prince
- Lorena Lara Rodriguez
- Veronica Basadre
- Daniel Reed

Appendix B. Implementation & Responsibilities Matrix

The goals of the 2023-2027 Strategic Plan are supported by the committees. Responsibilities of implementation and reporting for the goals are illustrated by the committee below.

Strategic Plan Goals

1. Serve as a resource for all financial aid professionals in California.
2. Increase association membership engagement to provide a worthwhile and meaningful experience.
3. Advocate for educational access for California’s students and serve as an authority in the State on student aid issues.
4. Increase and maintain association membership to continue to meet financial goals and support CASFAA’s financial sustainability.
5. Foster inclusion and equip members to assist the diverse populations we serve.
6. Improve preparedness and experience of Executive Council members.

CASFAA 2023-27 STRATEGIC PLAN DRAFT Appendix B. Implementation & Responsibilities Matrix			
Responsible Officer or Committee	Strategy	Goal	Done Yes/No
Electronic Initiatives, Chair, all	Promote knowledge sharing through expanding website content	1	
CASFAA Chronicle Editor	Establishing regular CASFAA Chronicle communication	1	
President	Send out scheduled communication introducing someone and resources.	1	
Membership Chair-Committee	Re-establish an ambassador program	1	
Electronic Initiatives	Create a Website maintenance plan.	1	
Training Committee	Create communication plan to promote training opportunities in CASFAA Chronicle, social media (facebook), email and promotions of resources at training events.	1	
Past President, President	Ensure CASFAA Chronicle Editor position is filled	1	
Segmental Leads, Training Chair-Committee	Survey members to determine areas/topics of need to focus training.	1	
President Elect	Send a survey out to gauge needs and wants.	2	

CASFAA Strategic Plan 2023-2027

President	Create a position for membership chair- engagement focused	2	
Training Chair	Consistent and relevant training by qualified trainers	2	
Training Committee	Track participants attendance and put all information in one place so that the membership chair can follow up with them	2	
Membership Committee, Segmental Leads	Plan quarterly mixers by region (e.g. Northern and Southern California) to connect, network and promote CASFAA	2	
Segmental Leads	Community platform or messaging platform to have free form conversations for the state and each region. They could be work related or more. Just to stay connected For example- Slack. Track participation	2	
Membership Chair	Promote member opportunities at all CASFAA events.	2	
Training Committee, VP Federal issues, VP State Issues, Segmental Leads	Continue to expand training and professional development opportunities to members	2	
Training Committee	Promote volunteer opportunities at all CASFAA events.	2	
Training Committee, Conference Committee, Membership Committee	Add feedback survey to all training and CASFAA sessions.	2	
Training Committee, Membership Committee	Follow up with event participants via email to promote member opportunities.	2	
All	Explore and promote incentives for members.	2	
Membership Chair	Update materials highlighting the benefits of CASFAA membership	2	
Past President	Survey members annually to determine satisfaction and type of events.	2	
Scholarships Committee	Increase scholarships to events for members and non-members	2	
Past President, President	Ensure VP State and Federal issues are filed each year.	3	
VP Federal and VP State Issues	Monitor and track proposed and passed legislation	3	
VP Federal and VP	Ensure Representatives from each segment are on Federal	3	

CASF AA Strategic Plan 2023-2027

State Issues	and State Issues committees.		
VP Federal and VP State Issues	Publish and send Federal and State position papers on current bills to Federal and State representatives.	3	
VP Federal and VP State Issues	Highlight advocacy efforts and opportunities in the CASFAA Chronicle and other publications.	3	
VP State Issues, All	Increase CASFAA membership participation at “Day” at the Capitol.	3	
Membership chair, President, Past-President.	Increase CASFAA awareness through targeted marketing, engagement focused activities/ onboarding for new members and new EC members.	4	
Funds Development Chair,	Provide seasonal training opportunities for vendors to engage with current and prospective clients.	4	
Past President, President	Ensure the Treasurer position is filled consistently by an experienced individual.	4	
Treasurer	Maintain detailed and consistent policies and procedures.	4	
Treasurer	Cross training.	4	
Secretary, Electronics Initiatives, Chronicle Editor	Create and publish meeting notes on a regular basis on the CASFAA website and link to on CASFAA Chronicle.	5	
Access and Diversity Chair, Training Committee	Create and implement training on topics of inclusion and diversity to all members	5	
President Elect, President, Past President	Review Mission Statement/vision and goals to align with the regional (WASFAA) and national association (NASFAA)	5	
Access and Diversity Chair, Conference Program Chair	Access and Diversity committee present at the annual conference.	5	
Access and Diversity Chair, Training Committee	Closed captioning on webinars	5	
Access and Diversity Chair, Training Committee, 1040 Workshops Chair	Training the trainers: bringing in someone to train the Training committee on unconscious bias, access, diversity and inclusion.	5	
President and President-elect	Implement annual formalized on-boarding process lead by president and president elect to ensure all EC have contacts on-boarding	6	

President-Elect	During on-boarding process establish relationship with prior representative	6	
All, all EC for their positions	Update all EC job positions on the website (part of policy and procedures)	6	
President-Elect, President	Review and update policy and procedures on the website.	6	
President-Elect, President	Review published Bylaws to ensure they include all updates.	6	
President	Survey Executive Board annually on satisfaction and resources	6	
President, Past-President	Implement off boarding processing collecting feedback on experience to share with the upcoming year EC.	6	
President, Past-President	Schedule and publish Executive Council meetings and events before the transition meeting, when able, to ensure optimal attendance and participation.	6	
All, Electronics initiative	Document organization history in secure online location to ensure continuity.	6	
President-Elect, President, Past-President	Promote Leadership opportunities and experiences within the organization.	6	
All	Look into ways to promote continuity (e.g. increase federal and state positions from 2 to 3 years, mentor committee members to EC positions).	6	
All	Mentorship pipeline for leadership roles.	6	
Segmental representatives, Association Services Representative, High School Relations	Maintaining relationships with members in other segmental organizations	6	
President	Receive trainings at each EC meeting to promote professional development within the profession.	6	

CASF AA 2023-2027 Strategic Plan Measures Tracking Tool

GOAL 1. Serve as a resource for all financial aid professionals in California.					
A. Measure traffic on website pages					
	2023	2024	2025	2026	2027
Top 3 most popular pages					
Number of times logged into CASFAA account					
B. Consistent publication CASFAA Chronicle subscription					
	2023	2024	2025	2026	2027
Number of publications issued per year					
Number of time accessed					
C. Track member attendance and participation at annual conference					
	2023	2024	2025	2026	2027
Number of Conference Attendees					
D. Training attendance					
	2023	2024	2025	2026	2027
Number of Trainings					
Total Number of Attendees					

GOAL 2. Increase association membership engagement to provide a worthwhile and meaningful experience					
A. Increase number of member institutions					
	2023	2024	2025	2026	2027
Total number of member institutions					
Total number of member types					
B. Increase member satisfaction					
	2023	2024	2025	2026	2027
Annual Survey results percentage satisfaction rate					
C. Increase the number of and participation in membership events					
	2023	2024	2025	2026	2027
Number of events					
Number of participants					

GOAL 3. Increase association membership engagement to provide a worthwhile and meaningful experience					
A. Increase number of member institutions					
	2023	2024	2025	2026	2027
Total number of member institutions					
Total number of member types					
B. Increase member satisfaction					
	2023	2024	2025	2026	2027
Annual Survey results percentage satisfaction rate					
C. Increase the number of and participation in membership events					
	2023	2024	2025	2026	2027
Number of events					
Number of participants					

GOAL 4: Increase and maintain association membership to continue to meet financial goals and support CASFAA’s financial sustainability.					
A. Increase and maintain institutional membership year over year					
	2023	2024	2025	2026	2027
Number Institutional members					
Number of Individual members					
B. Increase and maintain vendor investment year or year					
	2023	2024	2025	2026	2027
List of vendors					
Number vendors invested					
Number of Associate members					
Survey vendors satisfaction level					
C. Asset management- Invest in funds that are insulated from economic fluctuations with a proactive approach.					
	2023	2024	2025	2026	2027
Reviewed investment funds annually Y/N					

GOAL 5: Foster inclusion and equip members to assist the diverse populations we serve.

A. Increase training opportunities by offering diversity and inclusion topics at each CASFAA event

	2023	2024	2025	2026	2027
Number institutional members					

B. All volunteers who deliver content will receive training on diversity and inclusion topics prior to CASFAA events

	2023	2024	2025	2026	2027
Trainers completed diversity and inclusion training? Y/N					

C. Increase awareness of diversity and inclusion topics, initiatives, and resources

	2023	2024	2025	2026	2027
Survey membership: DEI awareness?					

GOAL 6: Improve preparedness and experience of Executive Council members.

A. Increase the satisfaction of Executive Council members

	2023	2024	2025	2026	2027
Annual survey results					

B. Offer professional development opportunity at each Executive Council meeting

	2023	2024	2025	2026	2027
Professional Development EC meeting Quarter 1					
Professional Development EC meeting Quarter 2					
Professional Development EC meeting Quarter 3					
Professional Development EC meeting Quarter 4					

C. Attrition rates of Executive Council

	2023	2024	2025	2026	2027
Percentage EC positions filled Voting					
Percentage EC positions filled non-Voting					

D. Survey of EC after each meeting on preparedness (if head of committee, survey committee members for feedback).

	2023	2024	2025	2026	2027
On Boarding survey completed					
Off Board survey completed					