



CASFAA

CALIFORNIA ASSOCIATION
OF STUDENT FINANCIAL
AID ADMINISTRATORS

MISSION STATEMENT

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.

VISION STATEMENT

CASFAA will:

- * Serve as a resource for all financial aid professionals in California.
- * Provide members with opportunities to become actively involved in the activities of the Association.
- * Prepare members to assume leadership roles in the student aid profession, the Association, and other financial aid associations.
- * Serve as an authority in the State on student aid issues and be consulted regularly by Federal and State policy makers, the media, and other educational partners; and
- * Be proactive with regard to positions on State and national financial aid policy issues, and in protecting the interests and rights of California students for educational access and choice.

Visit CASFAA at <http://www.casfaa.org>

WHAT IS THE CALIFORNIA ASSOCIATION OF STUDENT FINANCIAL AID ADMINISTRATORS (CASFAA)?



CASFAA is a non-partisan, non-profit professional organization with a membership of more than 1700 California student financial aid administrators (and financial aid administrators from other states who can belong as Associate members). Representing more than 500 colleges and universities, its members share a common goal of improving access to and delivery of federal,

state, institutional and private donor financial aid to students in the State of California.

Training events occur on a frequent basis so that our members may be kept abreast of the ever-changing regulations governing the administration of financial aid. Each year CASFAA hosts an annual Conference that alternates between Northern and Southern California. The annual Conference is the premier training event for members. More than 60 breakout sessions are available over a two and one-half day event that address the challenges faced by regulations and policies that affect the administration of financial aid.

CASFAA'S HISTORY

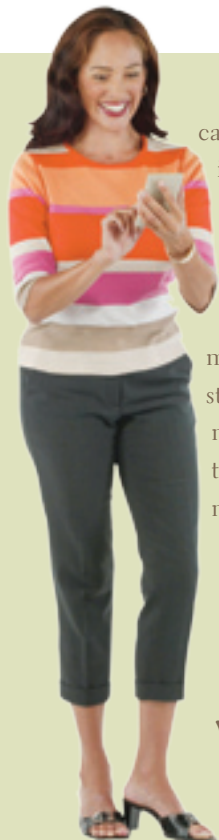
In September 1971, an Ad Hoc committee met at the Huntington Hotel in Pasadena to study the desirability of organizing the California State Financial Aid Officers Association. Members of the Committee were: Robert Huff of Stanford University, Gene Miller of Pasadena City College, Frank Schneider of the University of Santa Clara, and Donald Ryan of San Jose State University. The group recommended that an organizational meeting be called at the annual Western Association of Student Financial Aid Officer Conference to be held in San Diego in January, 1972.

On Saturday, January 8, 1972, the meeting was held in the Toledo Room of the Sheraton Inn, San Diego. During the session, Sumner Gambee of the California State Universities and Colleges agreed to serve as chairman of the nominating committee to recommend a slate of officers for the proposed association. Also, Robert Huff of Stanford University agreed to chair a committee to develop the constitution.

The newly elected officers of the Association held their first organizational meeting at Stanford Uni-

versity on June 9, 1972. As a result of the initial call for affiliation, 177 financial aid administrators in the state of California became charter members of the Association. Committee Chairs were chosen and it was decided that the first annual conference of the full membership of the organization should be held in Monterey, November 19-21, 1972. Don Ryan of San Jose State University was appointed to serve as the first conference chairman. A total of 170 members registered for the first annual conference that was held at the Monterey Holiday Inn. Since the initial conference was called a "retreat," rather than a formal meeting, an official business meeting was not held as part of the conference.

In September of 1997, a CASFAA Long-Range Strategic Planning Retreat was held in San Diego. The purpose of the retreat was to discuss ideas and make recommendations about the future direction of the association. This included defining and refining activities and the management of the organization. Participants discussed the current committee structure and recommended possible realignment of CASFAA activities under the four



categories of (1) Training; (2) Legislative Advocacy; (3) Membership/Communication; and (4) Association Governance. Consideration was given to move from the existing standing committee structure to a project-based structure of organization. By moving to a project-based structure, it was envisioned that more members would be involved in

CASFAA activities, since volunteers could commit time to a given project which may not require involvement for an entire year. Only the chair or project director would continue to coordinate projects for the full year, with the assistance of a project coordinator. As a result of this recommendation from participants of the Long-Range Strategic Planning Retreat, the 1998 CASFAA organizational structure was re-aligned on a trial basis utilizing a project-based format which continues to this day.

WHAT IS CASFAA'S PURPOSE?

Our members believe that student financial aid programs enable deserving students to realize their educational goals and to become productive members of society. To this end, CASFAA's purpose is to facilitate access to the financial funding available from many sources so that students can achieve both access to, and choice of the college or university they want to attend.

Let's face it! Financial aid is sometimes a mystery to students, parents, university and college administrators, legislators and the general public. In a world of rapidly changing technology and global competition higher education is an absolute national investment in our collective future. With this in mind, our mutual goals are:

- * To ensure that every California student who desires a post-secondary education can achieve his/her goal without having to worry that finances are a barrier to that dream.
- * To effectively administer federal and state funding and to ensure the regulatory requirements are fairly and equitably applied to all student financial aid applicants and recipients.
- * To advocate on behalf of the students of California for funding from federal, state and private sources.
- * To serve as the contact for students, parents, legislators, the media and others who may need assistance or have questions about financial aid.
- * To provide quality training and professional development opportunities at low cost to all financial aid professionals.
- * To encourage ethnic and financial diversity in our profession and on our campuses.
- * To encourage highly qualified individuals to enter the profession.
- * To offer training scholarships to members who are employed by institutions that cannot afford training for their employees.
- * To encourage financial aid professionals to participate in Outreach to California students and parents in such activities as high school nights and California Cash for College so that completing application forms is less intimidating.
- * To advertise employment positions available to persons with an interest in entering the financial aid profession and/or achieving a promotion in their chosen profession.
- * To serve as a networking entity for members who have questions about the administration of financial aid.
- * To provide a listserv for members to ask for assistance from the greater financial aid community.
- * To encourage leadership potential by offering volunteer positions in the association.
- * To ensure that all segments of California post-secondary education has a voice on issues that affect our students, our profession and our institutions and an advocate on their behalf.

VOLUNTEER OPPORTUNITIES

CASF AA is a volunteer organization. This committed spirit of volunteerism makes CASFAA an outstanding and vibrant association. As a volunteer one has the opportunity to expand leadership skills, network with colleagues, and grow professionally within the financial aid profession. Volunteers participate in a wide range of community and project activities as well as training events. Participating in meetings, telephone conferences, webinars are part of a volunteer's responsibilities. These committees, under the leadership of an appointed Chair, develop budgets for their annual projects, recommend bylaw changes or policy changes to the Executive Council, and keep Executive Council informed about issues they identify as important to the membership. In addition, they provide articles to the CASFAA Newsletter proposing information to post on the CASFAA website.

These Association volunteer activities include:

- * Advocacy (State and Federal Issues)
- * Ambassadors (serve as a welcoming body to new members)
- * California Cash for College (assist students and families with completing the federal, state and institutional applications for aid, including the FAFSA).
- * College Savings and Awareness (529 Plans and other investment strategies and vehicles for saving for college)
- * Communications (newsletter, news releases, listserv, rapid response to proposed legislation)
- * Conference (premier financial aid training event in the nation)
- * Electronic Initiatives (Website and listserv)
- * Ethnic Diversity Issues
- * Federal Issues
- * Fund Development
- * Graduate/Professional School Issues and Training Committee
- * High School Issues
- * JobsLink (a job placement service)
- * Leadership Institute (a proposal that is currently being studied)
- * Management Institute
- * Membership
- * Mini-Conferences (summer training events)
- * Newsletter
- * Policies and Procedures for the organization
- * Proprietary Issues and Training Committee
- * Scholarships for CASFAA training
- * State Issues
- * Training and Professional Development
- * Volunteer Coordination
- * Web Oversight

Volunteer forms are available at <http://www.casfaa.org>. CASFAA strives to place association members willing to commit their time and effort to any of the above functions of the organization on one of the committees. Committee/project descriptions are available at www.casfaa.org in the Policies and Procedures document or interested persons can contact leadership or committee chairs for additional information.

Most committees begin meeting in January. Members are encouraged to participate in the association to ensure CASFAA remains a strong association and a leader in shaping state and national financial aid policy in the state and the nation.



WHO BELONGS TO CASFAA?

CASFAA is an association of financial aid professionals from each of the segments of California post-secondary education: California Community Colleges, California State Universities, Independent/Private Institutions, Proprietary Institutions and the University of California. In addition, professionals from the California Student Aid Commission, the lending community, guarantee agencies and the U.S. Department of Education, as well as other state and local agencies. To help ensure the appropriate disbursement and reconciliation of student aid funds, business officers of institutions are also encouraged

to become members. Staff members of legislative offices, both state and federal, and staff of other organizations that have an interest in student financial aid are encouraged to attend our training events, especially the annual Conference.

Conference speakers and seminar presenters come from a wide range of the population to offer different perspectives on the administration of student financial assistance, to help build leadership skills, and to foster professional development with the “nuts and bolts” of financial aid for our beginners.

THE ANNUAL CONFERENCE

The annual CASFAA conference is the premier training event of the year. It is held in December when the volume of workload for financial aid offices allows more administrators to attend. In excess of 60 breakout sessions are offered to beginners, intermediate and seasoned financial aid administrators as well as two or three General Ses-

sions—one of which is a federal update conducted by staff of the U.S. Department of Education. The Conference is held each year alternating between Northern and Southern California. More than 1500 financial aid professionals attend annually. CASFAA prides itself on having one of the largest and best state Conferences in the nation.

LEGISLATIVE ADVOCACY

CASFAA believes that one of its primary goals is advocating at the federal and state level on behalf of the students that our institutions serve. We are interested in visiting with our state and federal leg-

islators and answering questions that they may have if they need instant feedback. We welcome contact by legislative bodies that need assistance on pressing issues that may need input before a vote.

INTERESTED IN BEING A MEMBER OR LEARNING MORE?

Membership forms are available at <http://www.casfaa.org>. Anyone attending the annual conference becomes a member for the following year. Membership is either active or associate. Only active members vote in association elections. For information on

the classification of members, please visit the website and open the membership application form which provides a definition.

Please feel free to contact any of the officers on the Executive Council if there are questions or additional information is needed. Their names and contact information is available on the CASFAA website.



STRUCTURE OF CASFAA

Meetings of the **Executive Council** are scheduled by the President, as necessary, throughout the calendar year. The purpose of these meetings is to identify the annual objectives of the Executive Council, to conduct the business of the Association, to review committee reports, and to transmit information between the officers, the Segmental Representatives and the Members-at-Large.

The **President** is elected by the membership to provide leadership for all the activities and business of the Association. The President appoints Committee Coordinators and Committee Chairs and selects the dates and locations of the quarterly business meetings. The President also presides over the annual Business Meeting at the conclusion of the annual Conference in addition to representing CASFAA at national or statewide functions and serves on the Executive Council of the Western Association of Student Financial Aid Administrators as the California representative.

The **Past-President** serves as a mentor to the President to provide a historical perspective, chairs the Nominations and Elections Committee, serves on the Fiscal Planning and Strategic Planning Committees. Also serves as Parliamentarian at Executive Council meetings.

The **President-Elect** assists the President in carrying out the goals of the Association, chairs the State Issues Committee, and serves as the liaison to the California Student Aid Commission and the annual Conference committee. The main goal is to learn from the current President and Past-President.

The **Vice President** assists the President in carrying out the goals of the Association and chairs the Federal Issues Committee. As Chair of the Federal Issues Committee, presides over and drafts responses to legislation that states the positions of the Association to appropriate federal entities.

The **Secretary** keeps and maintains minutes of the Executive Council meetings, records motions and serves as liaison to the Site Selection committee to prepare reservations for members of Executive Council who attend the quarterly meetings. The Sec-

retary prepares and submits a synopsis of the minutes to the Newsletter Editor to keep the membership advised of the actions of the Council. The Secretary takes minutes at the annual Business Meeting of the membership at the annual Conference and provides a copy to the Conference Chair for inclusion in the program of the next Conference.

The **Treasurer** acts as the fiscal agent for CASFAA and reports to the Executive Council the state of its finances on a quarterly basis and provides a report to the Newsletter Editor to keep the membership informed about the financial stability of the Association.

The **Treasurer-Elect** chairs the Fiscal Planning Committee and learns from the Treasurer in order to facilitate a successful transition at the conclusion of the annual Conference.

The **Segmental Representatives** are elected by members of their segment to represent and provide information about Segmental Issues to the Executive Council. They host a meeting at the annual Conference. They provide a report to the Newsletter Editor to keep the membership informed of segmental activities and issues. They represent: California Community Colleges, California State Universities, Independent Colleges and Universities, Proprietary Schools, and University of California.

The **Members-at-Large** represent the Graduate and Professional Issues and Ethnic Diversity Issues on the CASFAA Executive Council. They preside over annual training for their constituents and host a training meeting at the annual Conference. They provide a report to the Newsletter Editor to keep the membership informed of issues and activities of their constituency.

A list of the current Executive Council is available on the website and if there are questions, please feel free to contact one or more of the officers for assistance.





CSU The California State University

