



## CASFAA Members Facilitate Access to Financial Aid

CASFAA is a non-partisan, non-profit professional organization with a membership of more than 900 California student financial aid administrators. Representing more than 240 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. Our membership varies from year-to-year based on economic conditions and a college's ability to pay membership fees.

Training events for our members 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 50 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 offers pre-conference events as well, such as the Graduate & Professional Symposium and in past years when the law required them, Proprietary Certification Workshops.



### Mission Statement

To promote 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.

### Membership

Membership forms are available at [www.casfaa.org](http://www.casfaa.org). Anyone attending the annual conference becomes a member for the following year. Membership categories are: Active and Associate. Active members are California professionals who work at the campus and may vote in association elections. Associate members may be professionals from other states, our lender and guarantor partners, students and high school counselors. Associate members do not vote in CASFAA elections.



## What is CASFAA'S purpose?

**We found 14 observable and measurable goals which define who we are.**

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 aid funding available from many sources so that students can achieve not just access to, but choice of the college or university they want to attend.

Let's face it! Financial aid is 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 college education can achieve their goal without having to worry that finances are a barrier to that achievement.
- To be good stewards of California and United States citizens' taxpayer dollars by being knowledgeable about the rules and regulations and to ensure they are fairly and equitably applied to applicants for financial aid.
- To advocate on behalf of the students of California for funding from federal, state, and private sources.
- To encourage highly qualified individuals to enter the profession.
- 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 and affordable training and professional development opportunities to all financial aid professionals.
- To encourage ethnic and financial diversity in our profession and on our campuses.
- To offer training scholarships to members who are employed by institutions that cannot afford training for their employees when sufficient funding is available.
- To encourage financial aid professionals to participate in Outreach to California students and parents in such activities as high school nights and Cash for College events so that completing application forms is less intimidating.
- To advertise positions available in the profession to persons with an interest in entering the 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 education have a voice and an advocate on their behalf.

### **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.



## Volunteer Opportunities

CASFAA 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 within the financial aid profession. Volunteers participate in a wide range of community and project activities and events. Meetings, telephone conferences and webinars are part of a volunteer's responsibilities. These volunteer activities include:

- Advocacy (State and Federal Issues)
- Combine with Electronic Initiatives (Website, Social Networking sites...)
- Conference (premier training event in the West)
- Ethnic Diversity Issues
- Graduate/Professional School Issues
- High School Relations
- JobsLink (a service to help institutions offer employment opportunities and individuals to find employment)
- Membership Services
- Newsletter
- Policies and Procedures for the organization
- Scholarships for CASFAA training (when funding is available)
- Training and Professional Development

## CASFAA believes that student financial aid programs enable deserving students to realize educational goals and to become productive members of society.

CASFAA is an association with financial aid professionals from each of the segments of California higher education: Community Colleges, California State Universities, Independent/Private Institutions, Proprietary Institutions and University of California. In addition, professionals from the California Student Aid Commission, the lending community, guarantee agencies, Office of the Inspector General, federal Department of Education, as well as other state and local agencies. Business Officers of institutions are also encouraged to become members to ensure the appropriate disbursement of student aid. Staff members of legislative offices, both state and federal, and staff of agencies that have an interest in financial aid for students 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 financial assistance to students; to build leadership skills; to offer humorous relief from the stress of the profession; to interact with legislators, tax professionals, auditors, and federal policy makers; to teach time management techniques; and to provide the "nuts and bolts" of financial aid for our beginners and seasoned professionals.

[www.casfaa.org](http://www.casfaa.org)

**For more details on our organization, check out our official website.**

A list of the current Executive Council is available on the website. Please feel free to contact one or more of the officers for assistance if you'd like more information.



## We need YOU!

Volunteer forms are available at [www.casfaa.org](http://www.casfaa.org). The association strives to place anyone willing and able to commit their time and effort to any of the functions of the organization a place on one of the committees. Committee/project descriptions are available or interested persons can contact leadership or committee chairs for additional information.

## COMMITMENT

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 financial aid policy in the state and the nation.



## 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 University 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 we believe:

CASFAA believes that every effort must be made to provide student access to the educational opportunities best suited to individual needs. CASFAA has a continuing commitment to ensuring that all students be provided an opportunity to pursue a quality postsecondary education, and;

CASFAA believes that student financial aid programs enable deserving students to realize educational goals and to become productive members of society.

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