

# **EASFAA at 60: Honoring Our Legacy, Shaping the Future**

## **Strategic Plan (2025-2028)**

### **Background:**

With the most recent strategic plan for EASFAA due to expire and the Association approaching its 60th anniversary, the 2024-25 Regional Council focused in earnest on the task of developing its next strategic plan. This work began immediately at the first meeting of the 2024-25 Regional Council.

The Council's July 2024 retreat at Foxwoods Casino and Resort in Connecticut identified two areas that needed to be addressed when crafting the next strategic plan for EASFAA:

1. The current plan was lengthy and felt difficult for a volunteer association to follow; and
2. The next plan needed broad representation and input from the membership

### **Strategic Planning Process:**

For the first time in recorded history, a committee of colleagues named "committee members at large" were seated at the Regional Council. These members were selected to bring their ideas, feedback, and creativity to the work of crafting EASFAA's next strategic plan. Broad representation from nearly all EASFAA states and territories were asked to join in the work of strategic planning.

Concurrently, 2024-25 EASFAA President Tayler Kreutter and President-Elect Ken Ferreira embarked upon a listening tour at all EASFAA states that gathered feedback from the membership, asking the members three important questions:

- What does EASFAA do really well?
- What does EASFAA need to change?
- What is one thing the next EASFAA strategic plan must contain?

Through the listening sessions and the work of the 2024-25 EASFAA Council, the following themes emerged for further development into strategic goals for the Association:

- Leadership
- Diversity, Equity, Inclusion, and Belongingness
- Membership
- Training and Professional Development
- Annual Conference

At the January 2025 Regional Council meeting in Albany, New York, the Council came together in working groups to transform member feedback and emerging priorities into the strategic goals outlined below. This collaborative effort reflects our shared vision for EASFAA's future—and with it, we can confidently and proudly answer a question at the heart of our mission:

### **What's the value of EASFAA?**

**EASFAA is where connection meets impact.** We bring financial aid professionals together through a premier annual conference, deliver standout training for every career stage, embed inclusion into everything we do, build strong and ethical leadership, and foster a thriving member community where everyone has a voice and a role.

## **Strategic Goal 1: Leadership**

EASFAA will consistently commit to excellence in leadership.

### **Objective 1: Accountability**

The executive committee, with approval by regional council, will craft a code of ethics and conduct to be signed by all elected officers by July 1, 2025. Required of all nominees who agree to run for all elected offices moving forward.

### **Objective 2: Continuity**

Create a specific leadership transition framework and calendar that details all transitional elements for subsequent councils that will be affirmed within the code of ethics and conduct

### **Objective 3: Effectiveness**

Clarity of commitment and purpose through mandatory onboarding protocol that includes 360 degrees of communication, orientation and succession planning

## **Strategic Goal 2: Diversity, Equity, Inclusion and Belonging (DEIB)**

Continuously embed Diversity, Equity, Inclusion, & Belonging (DEIB) into the core of organizational culture and operations by systematically integrating DEIB principles into decision-making, policies, partnerships, and initiatives to ensure equitable and inclusive outcomes for all stakeholders.

### **Objective 1: Promote organizational accountability through DEIB Committee**

- Add the DEIB Committee as a standing committee in our bylaws.
- Publish an annual diversity and inclusion report summarizing survey findings, progress toward DEIB goals, and actionable steps for continuous improvement to demonstrate transparency and commitment.
- Provide consultation to other committees to ensure that membership diversity is represented and considered in the delivery of membership benefits.

### **Objective 2: Leverage data driven decision making for DEIB**

- Implement an anonymous survey to collect demographic information from our members based on the categories that are reflected in our diversity statement.
- Collect data about potential members and reasons for lack of representation in membership and leadership positions.
- Utilize survey results to identify underrepresented groups, demographic gaps, and areas requiring targeted DEIB initiatives within the organization.

### **Objective 3: Strengthen inclusion efforts**

- Develop and implement programs and policies that address the needs and concerns highlighted in the data collection, ensuring alignment with Title VII of the Civil Rights Act and the ADA.
- Create a DEIB page on the EASFAA website with information about various types of diversity, links to previous training, DEIB reports, links to external resources (NASFAA Diversity Toolkit), etc.
- Increase scholarship amounts to be able to support more AANAPISI, HBCUs, tribal colleges, and MSI institutions in EASFAA and advertise the opportunity to them directly.

### **Strategic Goal 3: Membership**

Foster a culture of active participation and deeper engagement among EASFAA members.

#### **Objective 1: Increase member engagement by 10% year over year**

Host a series of professional development opportunities including leadership development, networking events, training programs, and other activities based on member feedback and emerging trends.

#### **Objective 2: Implement at least two targeted campaigns annually**

Design campaign to enhance and expand EASFAA's outreach efforts to current and new members by utilizing digital tools and innovative strategies.

#### **Objective 3: Conduct a comprehensive review of the membership structure**

Review membership structure to help increase access, participation, and engagement and present options for a revised model by May 2026.

### **Strategic Goal 4: Training and Networking**

Position EASFAA as the premier training and networking resource for its membership.

#### **Objective 1: Maintain a roster of expert trainers to deploy**

Maintain a pool of expert presenters who are available to support members' training needs. Presenters and their areas of expertise will be publicized on the EASFAA website with information on how to request a presenter or training.

#### **Objective 2: Establish a Virtual Community Connection Space**

Establish a community forum to create a virtual space for networking and peer support. This space can also be used for EASFAA to collect member feedback. Enable the ability for members to contribute to an on-demand resource bank. Address infrastructure, website functionality, accessibility, upkeep, and management requirements.

#### **Objective 3: Implement Cohort-Based Professional Development Programs**

EASFAA will implement cohort-based professional development programs tailored to the needs of both new and experienced financial aid officers. Initial tracks will focus on foundational training for novices and advanced skill-building for seasoned professionals, with future offerings to explore topics such as succession planning, front-line support, and sector-specific interests.

### **Strategic Goal 5: Annual Conference**

The EASFAA Conference will become the premier event for our regional financial aid professionals fostering collaboration, sharing best practices, and empowering attendees with innovative strategies to enhance student access and support professional growth.

#### **Objective 1: Enhance Collaboration Opportunities**

The conference committee will: Foster an environment that encourages networking and partnerships by organizing interactive sessions, panel discussions, and collaborative workshops where attendees can engage with peers, share insights, and build long-term professional relationships. Sharing best practices and innovative strategies that highlight successful models and cutting-edge strategies in student access and financial aid administration.

## **Objective 2: Empower Professional Growth**

The conference committee will: Offer a range of professional development sessions that focus on skill-building, leadership, and career advancement, providing attendees with tools and resources to grow in their roles and positively impact their institutions and communities. Ensuring that attendees leave with actionable knowledge to self-improvement.

## **Objective 3: Define the EASFAA Conference's Unique Value Proposition (UVP)**

- Marketing should include the key benefits of the EASFAA Conference: renowned speakers, cutting edge topics, and networking opportunities for participants.
- Target Audience: Clearly define who will benefit most from attending EASFAA. Measurable in the marketing plan.
- Increase new registrants from underrepresented institutions and organizations within the first year of the marketing campaign.
- Focus on expanding the reach of the EASFAA conference to diverse institutions (e.g., community colleges, non-FA organizations, or underfunded schools) through targeted outreach, partnerships, and special offers for these groups. Examples may include: offer scholarships, group discounts, or promotional codes to incentivize early registration from these audiences, helping to increase attendance and promote inclusivity at the event.