

## MASFAA Strategic Plan 2020—2023

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### 1. Overview of the Strategic Planning Process

Developing MASFAA’s Strategic Plan was guided by the following sets of activities beginning in mid-2018 and concluding with the unveiling of the Plan at the *MASFAA Annual Conference* in October 2019 in Chicago, Illinois:

- Obtained Executive Council approval and sponsorship for a new MASFAA Strategic Plan
- Convened a specially-appointed Strategic Plan Task Force to develop MASFAA’s Strategic Plan (see *Appendix A* for MASFAA Strategic Plan Task Force Membership)
- Held listening sessions with MASFAA members during the October 2018 *MASFAA Annual Conference* in Minneapolis
- Conducted an environmental scan of issues confronting both higher education and associations (see *Appendix B* for MASFAA Environmental Scan Information)
- Conducted a situational analysis of MASFAA
- Clarified and/or updated the mission, vision, and values of MASFAA
- Developed goals, objectives, and metrics aligned with the future directions of MASFAA
- Engaged the Executive Council in a review of the draft plan, including a discussion of strategic plan implementation implications and considerations
- Produced the final Strategic Plan document for MASFAA
- Communicated the new Strategic Plan to MASFAA membership at the October 2019 *MASFAA Annual Conference* in Chicago

### 2. MASFAA Vision Statement

The Vision for MASFAA is to be the recognized leader in providing networking, professional development, resources, and engagement opportunities for financial aid administrators by leveraging its distinctive role as regional association to meet diverse member needs and foster professional collaborations.

### 3. MASFAA Mission Statement

The Mission of MASFAA is to:

- Serve and promote the financial aid needs and interests of students and postsecondary institutions;

- Provide regional leadership in advancing financial aid knowledge and capabilities of members; and
- Offer engagement, professional development, and leadership opportunities for members.

#### 4. MASFAA Values

- **Relevance:** We value relevant, efficient, and effective training and professional development opportunities, as we continue to be challenged to do be efficient and effective with resources.
- **Diversity:** Just as we traditionally value access to higher education for all, we also value a culture of diversity and access to MASFAA leadership opportunities for all regardless of race, ethnicity, gender, religion, age, sexual orientation, nationality, disability, appearance, professional level or institution type (see the full *MASFAA Statement on Diversity* below).
- **Collegiality:** We value collegiality and our shared mission of helping all students have access to higher education opportunities regardless of income or college choice.
- **Mentorship:** We value the mentorship we have received from the experience of others and want to give back to the profession by providing mentorship to others.
- **Stewardship:** We value cost-effective, prudent, and judicious governance of the resources invested in MASFAA programs and continually measure the value of MASFAA efforts and its impact on the membership.

#### 5. MASFAA Statement on Diversity

“MASFAA fosters a transformative experience for its members that honors diversity, inclusion and social justice. We recognize a common unity that anchors and enlivens our commitment to inclusion and creates brave spaces for dialogue to happen, through initiatives that promote professional development. We hold ourselves accountable to this intentional vision through fostering an integrated community, and recognizing that each member of our organization brings their own unique perspectives, strengths, and critical inquiries to serve our mission. We will continuously evaluate our commitment to diversity through conscious engagement within the communities we serve, and will promote a culture of diversity and inclusion by encouraging involvement and access regardless of race, ethnicity, gender, religion, age, sexual orientation, nationality, disability, appearance, professional level or institution type.”

#### 6. MASFAA Strategic Goals and Objectives

Overview of MASFAA Strategic Goals:

1. Increase **membership** and member **engagement**
2. Provide relevant and distinctive **professional development** opportunities
3. Develop **future leaders** for the profession and for MASFAA
4. Promote a culture of **diversity and inclusion** within MASFAA
5. Secure and sustain MASFAA’s future through **effective governance**

##### Goal 1: Increase **membership** and member **engagement**

- 1.1 Consider a transition from a system of individual membership to that of institutional membership, including how institutional designees can list staff members who should have access to MASFAA under the institution’s membership.

- 1.2 Clearly identify and market the benefits of being a member of MASFAA by highlighting the services and advantages of membership.
- 1.3 Offer programming aimed at those who have not previously been members (e.g., what is MASFAA, why be involved, etc.).
- 1.4 Increase engagement of members through blog and social media by including polls and/or contests as part of posts in order to track and analyze response rates/trends.
- 1.5 Expand member involvement through use of short-term Task Force initiatives.
- 1.6 Develop a leadership development program that can meet via distance connection platforms to promote professional development and expand MASFAA's leadership pool.
- 1.7 Create leveled professional development to engage a wider range of members with a focus on individual traits/growth opportunities such as self-awareness, time-management, leadership, etc.
- 1.8 Review the selection criteria for *MASFAA Annual Conference* and *MASFAA Annual Summer Institute and Leadership Symposium* scholarships, to promote member attendance.
- 1.9 Honor individuals in MASFAA who are retiring through awards and recognition.

Goal 2: Provide relevant and distinctive **professional development** opportunities

- 2.1 Leverage the *MASFAA Annual Conference* to foster professional collaborations at conference sessions, workshops and presentations, with an emphasis on more clearly identifying levels of sessions (basic, intermediate, advanced) and the incorporation of soft skills to complement financial aid and leadership topics.
- 2.2 Use the *MASFAA Annual Summer Institute and Leadership Symposium* to support the development of leaders within our association, our states, our offices, and our profession through a curriculum that is innovative, inclusive, and highlights MASFAA's core values.
- 2.3 Offer a *MASFAA Webinar Series* for innovative professional development opportunities as a complement to other MASFAA offerings on emerging and popular topics.
- 2.4 Develop a *MASFAA Mentoring Program* to pair newer professionals with current MASFAA members to have assistance acclimating to the financial aid profession, to help build region-wide collegial relationships, and to become inspired to participate in MASFAA activities.
- 2.5 Create a MASFAA Professional Development Online Library to serve as an accessible online repository for items such as webinar series recordings, conference session handouts, pre-approved training resources, and materials from NASFAA, U.S. Department of Education, and other regional, state, or professional associations.

Goal 3: Develop **future leaders** for the profession and for MASFAA

- 3.1 Provide the opportunity for one aspiring leader from each state to attend the annual *MASFAA Annual Summer Institute and Leadership Symposium*.
- 3.2 Appoint and/or refer individuals who attended the *MASFAA Annual Summer Institute and Leadership Symposium* to serve on or lead MASFAA Committee, as well as run for MASFAA elected positions.
- 3.3 Directly solicit *MASFAA Annual Summer Institute and Leadership Symposium* attendees to either moderate or present at the *MASFAA Annual Conference*.
- 3.4 Co-sponsor *MASFAA Annual Summer Institute and Leadership Symposium* trainers to attend the NASFAA Leadership & Legislative Symposium.
- 3.5 Sponsor the attendance of the President-elect and the Treasurer-elect to attend the NASFAA Leadership & Legislative Symposium.

3.6 Commit to a Task Force model to keep current and future leaders engaged in important initiatives and opportunities for MASFAA.

**Goal 4: Promote a culture of *diversity and inclusion* within MASFAA**

- 1.1 Recognize that MASFAA members and the students served by our members bring with them personal identity attributes that include race, ethnicity, gender, religion, age, sexual orientation, nationality, disability, and appearance.
- 1.2 Maintain a *MASFAA Statement on Diversity*, reviewed and reaffirmed at a minimum of 5-year intervals, to acknowledge the wide range of diversity elements – membership attributes as well as personal identity attributes – the organization is seeking to promote and include.
- 1.3 Ensure that Executive Board, committee membership, and ballots account for the diversity found in MASFAA’s membership, sectors, and state representation, including inviting regular and associate members, public and private schools, 2-year and 4-year schools, professional level, and all member states to participate and be represented, whenever possible.
- 1.4 Seek the full range of membership attributes are represented in nominating and building committees and in other MASFAA opportunities.
- 1.5 Offer programs and conscious engagement of work surrounding personal identity attributes in professional development opportunities and at the *MASFAA Annual Conference* through use of a keynote speaker, a preconference workshop, and/or defined collection of interest sessions.

**Goal 5: Secure and sustain MASFAA’s future through *effective governance***

- 5.1 Ensure that *MASFAA Bylaws* reflect the vision, mission, and values of the Association and support the viability of the organization, including periodically updating policies and procedures to reflect the *MASFAA Bylaws*.
- 5.2 Actively engage in a systematic review of all current activities, products, and services utilized.
- 5.3 Develop a balanced annual operating budget that does not rely on reserves.
- 5.4 Maintain and develop all activities, products, and services within the framework of the associations approved financial policies.
- 5.5 Monitor, review, and revise, as necessary, the Association’s investment strategy.
- 5.6 Maintain effective and easily accessible committee meeting minutes, committee chair checklists, committee job descriptions, suggested task timelines, and protocols for transitions from committee chairs and executive board members.
- 5.7 Create easily accessible and thorough MASFAA archives.

**7. Suggested Metrics for MASFAA Strategic Plan Goals**

Goal	Suggested Metrics
1. Increase <i>membership</i> and member <i>engagement</i>	<ul style="list-style-type: none"> <li>• Number of new and retained/renewed members</li> <li>• Profile of membership</li> <li>• Percentage and type of member engagement</li> <li>• Website analytics</li> </ul>

Goal	Suggested Metrics
2. Provide relevant and distinctive <i>professional development</i> opportunities	<ul style="list-style-type: none"> <li>• Number and type of professional development opportunities offered</li> <li>• Feedback from participants' learning and experiences in professional development</li> <li>• Number and type of professional development resources/materials provided</li> <li>• Outcomes achieved as a result of professional development participation</li> </ul>
3. Develop <i>future leaders</i> for the profession and for MASFAA	<ul style="list-style-type: none"> <li>• Number of future leaders participating in leadership development opportunities</li> <li>• Profile of future leaders</li> <li>• Feedback from future leaders based on participation in various opportunities</li> <li>• Type of subsequent engagement from future leaders following initial leadership development opportunity</li> </ul>
4. Promote a culture of <i>diversity and inclusion</i> within MASFAA	<ul style="list-style-type: none"> <li>• Type of diversity and inclusion programming offered</li> <li>• Number and type of members engaged in MASFAA positions (committees, executive board, etc.)</li> <li>• Profile of membership</li> <li>• Reaffirmed <i>MASFAA Statement on Diversity</i></li> </ul>
5. Secure and sustain MASFAA's future through <i>effective governance</i>	<ul style="list-style-type: none"> <li>• Audits</li> <li>• Performance Reviews</li> <li>• Committee chair/board member exit interview/survey</li> <li>• Number of committees with process and protocol documents developed and used</li> </ul>

## 8. List of Appendices

- *Appendix A: MASFAA Strategic Plan Task Force Membership*
- *Appendix B: MASFAA Environmental Scan Information*

***Appendix A: MASFAA Strategic Plan Task Force Membership***

**Co-Chairs:**

Dick Battig  
Sara B. Holman

**Members:**

Kathy Bialk  
Gisella Baker  
Krissy Bhaumik  
Heidi Carl  
Alex DeLonis  
Alicia Frey  
Buddy Mayfield  
Nick Prewett  
Marvin Smith  
Susan Swisher  
Michelle Trame  
Randy Ulses

**Consultant:**

Stephen P. Hundley

**Appendix B: MASFAA Environmental Scan Information****Higher Education Issues**

1. Academic focus on teaching-learning leading to improved student success
2. Academic focus on operational and support aspects
3. Visible academic impact awareness by broader stakeholder base
4. Student demographics and social comfort
5. Enriching faculty cultures and environments
6. Research and scholarship
7. Business operations, efficacy, and productivity
8. Accreditation and public credibility
9. Societal expectations and public awareness
10. Synergistic and overlapping relationships
11. Institutions as anchors in their communities

**Association Issues**

1. Clarity of mission, purpose, and future directions
2. Sound finances and fiscal health
3. Diversification and sustainability of revenue streams
4. Risk management
5. Competing and complementary resources available through plentiful alternatives
6. Relevancy and the ability to compete in a crowded marketplace
7. Association leadership capacity and talent development
8. Volunteer/member recruitment, engagement, and satisfaction
9. Diversifying membership profiles
10. Keeping abreast of changes in content, technology, public policy, etc.
11. Navigating the advocacy and professional development roles
12. Identifying, implementing, and evaluating partnerships
13. Offering products and services that members both value and are willing to pay for