

Strategic Plan 2015-2018

The Strategic Plan of the Canadian Association of Student Financial Aid Administrators is intended to help guide the Association as it makes resource decisions about research, training, advocacy and community support activities. This Plan is built on the guiding objectives laid out in CASFAA's Constitution and By-Laws and summarized in the Mission Statement. The Strategic Plan uses these concepts to articulate a vision and set of goals for the Association over the next three years. It is recommended that this plan be reviewed annually and amended as needed to reflect emerging circumstances.

The Journey Ahead

This Plan is comprised of several key components, from broad to focused:

Pillars

The core competencies which will raise and sustain our association.

Vision Statement

Where we see ourselves in 3 years and beyond.

Mission Statement

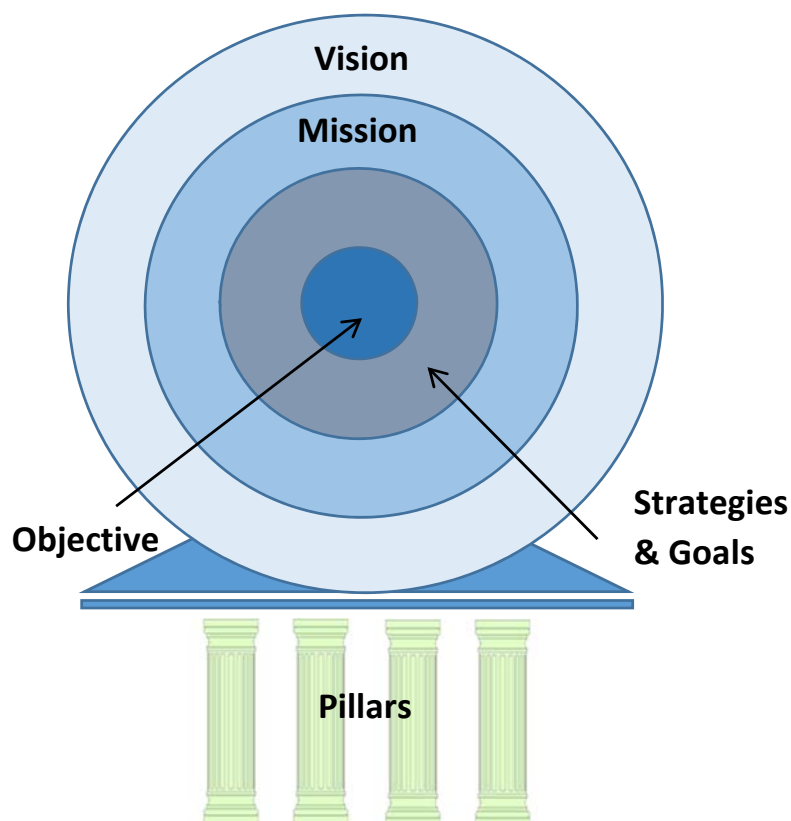
Who are we, what we do and how we do it.

Strategic Planning

GOALS are the statement we want to make about our business and direction we want to go.

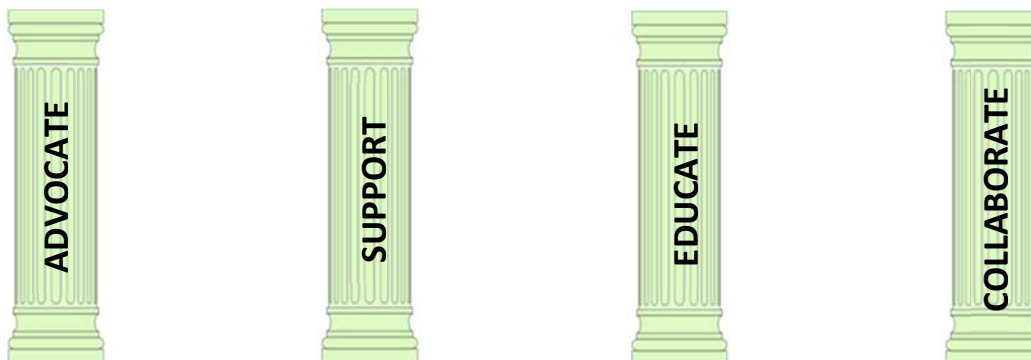
OBJECTIVES are the specific outcomes expressed in measurable terms.

ACTIVITIES are the planned actions to achieve the objectives.



CASFAA's Pillars

The four pillars ADVOCATE, SUPPORT, EDUCATE and COLLABORATE are defined as our core competencies to be leveraged for and fortified by all that we do.



Publicly support or recommend to/for:	Give assistance to/for:	Provide instruction to or create awareness for:	Find opportunities and work jointly with:
STAKEHOLDERS CASFAA members PSE educational institutions Government, federal and provincial/territorial Students and under-represented groups National student associations Provincial financial aid administrator associations Other PSE partners, agencies, councils and groups			

CASFAA's Vision Statements

To be regarded as:

- A valued partner to inform and influence the direction of student funding for post-secondary education, the primary means by which include student financial aid and awards.
- A contributor and champion in Financial Literacy, promoting student academic success through financial wellness.
- Agent to enhance and strengthen partnerships in policy development, research, best practices and service delivery relating to government student financial assistance.
- Responsive and supportive to our membership, providing a strong community of practice with valuable opportunities for professional development and collaboration.

CASFAA's Mission and Purpose

The Mission Statement was updated with the launch of our new website and is included below.

CASFAA represents Financial Aid Administrators and Awards Officers in post-secondary institutions who are dedicated advocates in helping Canadian students achieve financial wellness and success. CASFAA promotes the professional development of its members, and maintains a national profile with educational institutions, federal and provincial governments, financial institutions, and national PSE organizations.

As a respected player in the educational arena, CASFAA, on behalf of its members, takes an active role towards ensuring government financial aid policy removes financial barriers and focuses on student welfare.

This is further elaborated by the **five statements of purpose included in the Constitution**. While our goals may change from time to time, these principles should remain as originally written.

1. To promote the professional and education development of its members.
2. To foster communication among student financial aid and awards personnel at post-secondary institutions in Canada in regard to need-based programs and scholarship programs.
3. To review all government financial assistance policies and administrative processes and, on behalf of our members, make recommendations for appropriate changes in student assistance programs to promote accessibility and affordability, support retention and encourage scholarship.
4. To initiate or conduct and/or support studies/research on financial aid and financial literacy as required.
5. To cooperate with other agencies, councils, and/or groups as appropriate.

Values

Our mission and purpose shall be executed **collaboratively** and **transparently**, with **integrity** and **student centeredness**, and in a **sustainable** manner.

Strategic Goals, Objectives and Activities

Table 1 outlines CASFAA's five strategic goals, which are the 'big picture' statements about our organization and the direction we collectively wish to take. The objectives identify specific desired outcomes. The activities are the planned actions to accomplish these. Each year the CASFAA Board will reflect on these to assign priorities and timelines. Considerations will include resource availability and any environmental trends or current events (e.g. policy shifts relating to government programs) which impact the ability to fulfill our mandate. Additionally, the Board will provide progress reports to the membership based on this format.

Conclusion

This Strategic Plan is a living document which shall be adapted as the need and opportunity arises. It is not intended to be prescriptive but rather to create an occasion for dialogue and a common direction toward which our communal efforts will be placed.

The Strategic Plan will be tabled at each Annual General Meeting to provide members with a progress report and to solicit feedback on future direction. Members may write to president@casfaa.ca anytime to share comments and ideas.

Table 1: Strategic Goals and Objectives (spanning three years to 2018)

Goal	Objectives	Activities	Advocate	Support	Educate	Collaborate	Planned timeframe	Status Report as of April 30, 2016
<p>Optimal organizational structure for a strong and sustainable association</p>	<ul style="list-style-type: none"> Well-defined and distinct roles for each Board position. Expand membership to grow resources. Increase member engagement to amplify activities. Enhance links with province-based financial aid administrator associations, to leverage mutual interests. 	<ul style="list-style-type: none"> Propose structure of Board roles, create description Board onboarding and procedure manual for each position. Create orientation document for Regional Reps Create a schedule of Board’s key activities Review By-Laws and Policy manual Make AGM more engaging for members Annual membership drive with publication outlining benefits and value-proposition. Increase membership diversity with CASFAA conference travel grants for less-privileged or small schools. Enhance activities around merit-based awards to engage the Awards Officer community. Have at least one collaborative project per year. 	<p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p> <p>✓</p>	<ul style="list-style-type: none"> By end of May 2016 Ready for 2016/17 Board Ready for 2016/17 Board Ready for 2016/17 Board For AGM For AGM Commence in March 2016 ASAP Part of 2016 conference program including panel Financial Consumer Agency of Canada (FCAC) 	<ul style="list-style-type: none"> Complete In progress Complete In progress Complete In progress In progress Complete Complete Contract signed April 2016

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Goal	Objectives	Activities	Advocate	Support	Educate	Collaborate	Planned timeframe	Status Report as of April 30, 2016
		<ul style="list-style-type: none"> Form several Working Groups for members to participate in. Publish an Annual Report. Share summary of Board meetings. 					<ul style="list-style-type: none"> Two to be formed in 2015/16 To start in 2016/17 To start in 2016/17 	<ul style="list-style-type: none"> Active Working Groups: Improvements to Out-of-Province Summary, and Web Communications
Professional and Education Development of Members	<ul style="list-style-type: none"> Provide timely and cost effective training to implement new regulations and best practices. Strong and effective communications. Foster a strong community of practitioners. Elevate the strategic role of Financial Aid & Award Offices within educational institutions with respect to recruitment and retention, as well as policy. Increase collaboration opportunities. 	<ul style="list-style-type: none"> Continue to offer an outstanding annual conference that provides training and a forum for the exchange of ideas. Create FAO toolkits, including onboarding for new members. Create a Strategic Communications Plan. Heightening activity on our new website tool, especially as a community of practice. Introduce webinar training on learning space and forums. 	  	    	    	    	<ul style="list-style-type: none"> Annually To start 2017/18 To start 2016/17 Underway To start 2016/17 	<ul style="list-style-type: none"> June 2016 conference reflects this aspiration. Working Group formed in 2015/16

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		<ul style="list-style-type: none"> • Working Group to improve the Out-of-Province Summary to be as comprehensive and as practical as possible. • Working groups on specialized topics: aboriginal funding, disability funding and mental health links to financial wellness. • Share lobbying efforts on website to expand promotion at provincial and EI level. • Refresh Statement of Ethics. • Pilot Advisory Board to raise level of strategic dialogue around environmental trends, policy and enrolment management connections. • Project to gather national EI data to help inform organizational decisions • Create repository of relevant research studies and literature reviews to keep members current. 	<p style="text-align: center;">✓ ✓ ✓ ✓ ✓ ✓</p>	<p style="text-align: center;">✓ ✓ ✓ ✓ ✓ ✓</p>	<p style="text-align: center;">✓ ✓ ✓ ✓ ✓ ✓</p>	<p style="text-align: center;">✓ ✓ ✓ ✓ ✓ ✓</p>	<ul style="list-style-type: none"> • Underway • To consider in 2017/18 • Following blitz to MPs in 2016/17 • In 2016/17 • To consider for launch in 2017/18 • Consider for 2016/17 • Start May 2016 	<ul style="list-style-type: none"> • Working Group formed and completed in 2015/16 • Proposal submitted via CASFAA Research Grant opportunity • To start May 2016

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<p>Be a valued stakeholder in Canada Student Loan Program service delivery</p>	<ul style="list-style-type: none"> Continued member of CSLP Service Advisory Council (SAC). Maintain good relations with CSLP, NSLSC, provincial programs and student/PSE stakeholders. 	<ul style="list-style-type: none"> Presentations to create awareness about CASFAA and the EI role in government aid. Lobby for opportunity to review CSLP form templates for language clarity. Participation in requirements development of new NSLSC online platform and CRM. 	<p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p>	<p>✓</p> <p>✓</p> <p>✓</p>	<ul style="list-style-type: none"> Done in Nov 2016, planning ICSFAA Annually As opportunity arises 	<ul style="list-style-type: none"> Done in Nov 2016 at SAC, planning for ICSFAA. Done and communicated to CSLP for 2016/17 forms Conference call with CSLP in Feb 2016, and follow-up with scenarios to strengthen understanding of EI role

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<p>Inform and influence the direction of Canada Student Loan Program policy and impact.</p>	<ul style="list-style-type: none"> Continued co-Chair and member of CSLP National Advisory Group on Student Financial Aid (NAGSFA) Evidence-based orientation to strengthen policy positions. Initiate and support research projects. 	<ul style="list-style-type: none"> Update of Policy Positions document. Annual Pre-Budget submission to Standing Finance Committee. CASFAA Research Grant program Project to gather national EI data to help inform policy positions Lobbying effort with Members of Parliament 	<p>✓ ✓ ✓ ✓ ✓</p>	<p>✓ ✓ ✓ ✓ ✓</p>	<p>✓ ✓ ✓ ✓ ✓</p>	<p>✓ ✓ ✓ ✓ ✓</p>	<ul style="list-style-type: none"> Annually As opportunity arises Annually To be Research Grant proposal Infrastructure ready in 2015/16, deploy 2016/17 	<ul style="list-style-type: none"> Done for 2015/16 Done for 2015 Re-launched Jan 2016 for 2016/17 Proposal submitted Database of MPs finished
<p>Champion Financial Literacy</p>	<ul style="list-style-type: none"> Encourage focus on PSE student-specific financial wellness. Deploy financial wellness workshops across the country. Assess learning outcomes for continuous improvement. 	<ul style="list-style-type: none"> Continue participation on the National Steering Committee on Financial Literacy. Dedicated financial literacy sessions and discussions at annual conference. Encourage best practice sharing amongst members. Contract with Financial Consumer Agency of Canada (FCAC) to enhance existing content to be more PSE student centric. 	<p>✓ ✓ ✓ ✓</p>	<p>✓ ✓ ✓ ✓</p>	<p>✓ ✓ ✓ ✓</p>	<p>✓ ✓ ✓ ✓</p>	<ul style="list-style-type: none"> Ongoing Ongoing Ongoing Project to start April 2016 	<ul style="list-style-type: none"> Actively participating in meetings Included June 2016 conference See below. Contract signed April 2016. Task Force being struck

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		<ul style="list-style-type: none"> Explore FCAC/CASFAA webinars for students 		✓	✓	✓	<ul style="list-style-type: none"> Not pursued until previous item complete 	