



**WASFAA**  
**Strategic Plan**  
**2017 – 2020**

**Strategic Plan Updated 2014-17**

# Strategic Plan

2017 - 2020

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## Executive Summary

The purpose of this three-year strategic plan is to guide the decision-making of the Executive Council of the Western Association of Student Financial Aid Administrators (WASFAA) and to inform the membership of the priorities and activities of the Association. The goal of the plan is to ensure that WASFAA continues to serve its members most effectively and efficiently.

WASFAA's fundamental purpose and reason for existence is clearly articulated in the Association's mission statement:

To provide professional and personal development for its members in order to promote student financial aid and educational opportunities for students.

The Executive Council of WASFAA believes that how the Association accomplishes its mission is as important as the mission itself, and therefore has articulated a set of core values which are intended to guide and inspire the behavior and interactions of all WASFAA members. The core values of the Association are:

- Professional Growth & Development
- Inclusiveness
- Advocacy
- Collaboration

The following four (4) goals summarize the organizational priorities for the Association for the next three years.

1. Increase the size and engagement of the WASFAA membership.
2. Improve the Association's operational efficiencies and fiscal controls to achieve a balanced operating budget without the use of asset reserves or carry-forward monies.
3. Provide optimally effective training and professional development opportunities that are responsive to member needs.
4. Collect, and then communicate to appropriate decision-makers, the public policy positions of WASFAA region financial aid administrators; provide members with the support and education they need to further their own advocacy efforts.

*The 2017-2020 WASFAA Strategic Plan was approved by the Executive Council in its meeting on April 8, 2017. This marked the conclusion of the formal process of developing the Strategic Plan, but not the conclusion of the Association's strategic planning efforts. In support of the three-year Strategic Plan, Committees and Officers must annually develop goals and update the Measures Tracking Tool. The Strategic Planning Committee will continue to be responsible for ensuring that the Strategic Plan is reviewed and monitored regularly by the Executive Council and communicated to the membership of the Association.*

## Introduction

The process used to develop the 2017-2020 Strategic Plan was both comprehensive and inclusive. Beginning in 2015-16 under the leadership of the Past President, Kevin Jensen, the Strategic Planning Committee began the process to review and update the 2014-16 WASFAA Strategic Plan. In January 2016, Past President Jack Edwards stepped in due to Kevin's resignation. Given the fact that the 2015-16 Strategic Planning Committee would end in April 2016, the committee requested approval to have the 2014-16 Strategic Plan extended for one additional year to give the committee enough time to dedicate proper attention to develop the 2017-2020 Strategic Plan. At the February 17-19, 2016 Executive Council meeting, the Executive Council voted to extend the 2014-16 Strategic Plan one additional year.

Led by the Co-Chairs and members of the Strategic Planning Committee (see Appendix A), the process began by conference call with the Strategic Planning Committee charged to develop a new Strategic Plan that is streamlined, impactful, and aligned with our core values.

Our mission was re-written and a vision statement was added, but our core values for WASFAA during the next three-year period remain the same. The number of goals was condensed from eight to four.

Members of the Strategic Planning Committee and Executive Council met or conferred frequently throughout the strategic plan process to analyze and discuss strategy and progress. WASFAA President Mike Johnson committed a major portion of the agenda at the November 14-15, 2016 Executive Council meeting to discussion and review of the strategic plan update process. Exercises were conducted with Executive Council members in order to obtain important input. This input resulted in the editing of what had been set for Measures and Strategies/Actions.

## **WASFAA Vision and Mission Statements**

### **Vision:**

To cultivate an increasingly educated society by supporting and furthering the work of informed, ethical, and diverse student financial aid administrators and related professionals.

### **Mission:**

The Western Association of Student Financial Aid Administrators (WASFAA) is an organization dedicated to advancing access to and choice in postsecondary education for students in Alaska, Arizona, California, Hawaii and the Pacific Islands, Idaho, Nevada, Oregon, and Washington through:

- Training and professional development of its members,
- Encouraging and facilitating the exchange of information and ideas among its members,
- Promoting the participation of members who honor and reflect the diversity of the student populations they serve, and
- Advocating for laws and regulations that result in the effective, fair, and equitable administration of student financial aid programs.

## **Goals, Measures, and Strategies/Actions**

WASFAA's Strategic Plan will allow the Association to fulfill its mission and continue to provide members with outstanding services and support. The four (4) goals summarize the organizational priorities for the Association for the next three years. The details on how these goals will be accomplished using specific strategies and actions, who or what committee will be responsible for accomplishing them, and how success will be measured have been articulated below.

### **Goal 1. Increase the size and engagement of the WASFAA membership.**

#### **Measures:**

- A. Increase the number of WASFAA members.
- B. Increase the attendance at the Annual Conference, when reasonable given the conference location.
- C. Achieve and maintain optimal attendance at the Sister Dale Brown Summer Institute and the Jerry R. Sims Management & Leadership Institute to ensure both cost-effectiveness and quality of participant experience.
- D. Achieve annual increases in volunteer engagement, as indicated by participation on committees, writing newsletter articles, posting to social media, participating in advocacy efforts, and doing research.

#### **Strategies/Actions:**

1. Research the possibility of restructuring the membership model to include an institutional membership option.
2. Promote training and professional development events, including the Annual Conference, at least monthly beginning six months before each event (e.g., via the web, email, newsletter, and social media).
3. Promote volunteer opportunities (e.g., via the web, email, newsletter, and social media).
4. Provide scholarship opportunities for all training and professional development activities, including the Annual Conference. Promote those opportunities at least monthly, beginning four months before each event (e.g., via the web, email, newsletter, and social media).
5. Re-establish the mentoring program and develop expectations for levels of participation.
6. Optimize Annual Conference attendance by effective monthly web and social media promotion, providing advance notice of program content, and obtaining prominent, engaging keynote speakers.
7. Publish the online newsletter monthly and solicit reasonably priced monthly advertising from sponsors.
8. Sell WASFAA logo items such as t-shirts, memo pads, and book bags to maximize brand exposure. Give WASFAA logo items at no extra charge for attendance at training events.
9. Develop a comprehensive marketing strategy to effectively relate the benefits (i.e., return on investment) of WASFAA membership (institutional and/or individual).

#### **Committee Responsibilities:**

Strategy 1. Treasurer, Membership, Research

- Strategy 2. State Presidents, Communications, Conference, JRSMLI, SDBSI, Training, Leadership Development
- Strategy 3. President, State Presidents, Communications, Volunteer Development, Leadership Development, Scholarship
- Strategy 4. Treasurer, Ethnic Diversity Rep at Large, Awards & Scholarships, Communications, Conference, Fiscal Planning, JRSMLI, SDBSI, Training, Leadership Development
- Strategy 5. President, Past President, Ethnic Diversity Rep at Large, State Presidents, Volunteer Development, Leadership Development
- Strategy 6. Communications, Conference, Fund Development
- Strategy 7. Communications, Fund Development, Volunteer Development
- Strategy 8. Vice President, Conference, Fund Development, JRSMLI, SDBSI, Training
- Strategy 9. President, Past President, Communications, Membership, Research, Strategic Planning

**Goal 2. Improve the Association’s operational efficiencies and fiscal controls to achieve a balanced operating budget without the use of asset reserves or carry-forward monies.**

**Measures:**

- A. Decrease the use of asset reserves or carry forward monies each year, resulting in a balanced 2020 operating budget.
- B. Balance budgets for all activities (except Training Committee events, which will continue to be subsidized) exclusive of sponsorships by 2020.
- C. Evaluate growth of investments compared to annual goals, dictated and adjusted as needed per market forces.

**Strategies/Actions:**

- 1. Re-examine the number of and format of Executive Council meetings each year.
- 2. Establish chairs and vice chairs for committees by setting two-year appointments, allowing for efficiency and transition of duties.
- 3. Conduct committee meetings through conference calls and online whenever possible.
- 4. Price events so that registration fees cover event costs, as well as generates revenue for the association when possible (except Training Committee events, which will continue to be subsidized).
- 5. Use Travel Committee to ensure cost-effective management of airline ticket purchases for all organizational travel needs (e.g., Executive Council meetings, faculty attending JRSMLI and SDBSI, and guest speakers at conference).
- 6. Optimize site locations for events that provide affordability, ease of travel, and an environment conducive to learning.
- 7. Set tier pricing for sponsorship opportunities.
- 8. Reinstate non-member registration fees for training and professional development activities, including the Annual Conference. Promote Sister Dale Brown Summer Institute and Jerry R. Sims Management & Leadership Institute to financial aid administrators in other regions.

9. Allocate a set amount of asset reserves to be used as needed (e.g., every three years) to hire consultants to assist with identifying new revenue streams, operating inefficiencies, and/or marketing efforts.
10. Continue to participate in NASFAA-provided opportunities to discuss investment options.

**Committee Responsibilities:**

- Strategy 1. President, Site Selection
- Strategy 2. President, President-Elect
- Strategy 3. All Officers and Committees
- Strategy 4. President, Treasurer, Conference, Fiscal Planning, Fund Development, JRSMLI, SDBSI, Training
- Strategy 5. President, President Elect, Site Selection, Travel
- Strategy 6. President, President Elect, Site Selection, Travel
- Strategy 7. President, President-Elect, Past President, Treasurer, Fiscal Planning, Fund Development
- Strategy 8. Treasurer, Communications, Conference, Fiscal Planning, JRSMLI, SDBSI, Training
- Strategy 9. President, Treasurer, Fiscal Planning
- Strategy 10. Past President, Treasurer, Fiscal Planning

**Goal 3. Provide optimally effective training and professional development opportunities that are responsive to member needs.**

**Measures:**

- A. Increase participation in training activities.
- B. Evaluate post-event participant survey results utilizing the Core Assessment Questions for Evaluation of WASFAA Events contained in the WASFAA P&P.
- C. Recruit two new trainers for the Sister Dale Brown Summer Institute and one new trainer for the Jerry R. Sims Management & Leadership Institute annually; achieve an annual mix of veteran (four or more years of training experience), experienced (one to three years of training experience), and new (no previous training experience) trainers at all training events.
- D. Continue to offer new fall and spring trainings each year based on current topics of interest to financial aid community members.
- E. Create a leadership pipeline program by 2020.

**Strategies/Actions:**

1. Optimize the use of online training for focused topics.
2. Continue collaboration with state and other partners to publicize online training events.
3. Continue to offer NASFAA U credentialing opportunities as part of training events.
4. Institute a ‘train the trainer’ program to increase the pool of trainers and Annual Conference presenters.
5. Hold the Sister Dale Brown Summer Institute at the same two alternating locations each year. Select locations that provide an optimal balance of affordability, ease of travel, and an environment conducive to learning.



6. Hold the Jerry R. Sims Management & Leadership Institute at the same two alternating locations each year. Select locations that provide an optimal balance of affordability, ease of travel, and an environment conducive to learning.
7. Evaluate each training activity annually to determine the quality of the training effort, success of the registration process, appropriateness of time and location, analyses of marketing and communications, and perceived value of the training.
8. Serve as a clearinghouse/coordinator for training activities in the WASFAA region through collaboration with state associations, NASFAA, USED, vendors, and others to develop annual training plans; coordinate training topics to ensure minimal duplication; develop a master calendar of all training events and state association meetings in the region, including vendor training opportunities.
9. Collaborate with other WASFAA committees (e.g., State Presidents' Group, Annual Conference, Electronic Services, and Volunteer Development) and state associations to implement strategies to improve training activities.
10. Collaborate with non-WASFAA state associations, other regional associations, NASFAA, USED, and other industry partners to plan, promote, and provide training.
11. Establish a permanent, but flexible, training program and structure for leadership development that includes service in leadership positions within the Association, possibly modeled after the RNASFAA Leadership Pipeline program. Form a new Leadership Development Committee for this initiative.
12. Record webcasts and post them to the WASFAA website (along with any materials), with access available only to members.
13. Post WASFAA conference interest session presentations and handouts to the WASFAA website, accessible only to conference attendees and members.
14. Establish and maintain a library of readily accessible WASFAA training materials.

### **Committees Responsibilities:**

- |              |   |
|--------------|---|
| Strategy 1.  | Communications, Electronic Services, Training, Leadership Development                             |
| Strategy 2.  | Communications, State Presidents, Training  |
| Strategy 3.  | Training, SDBSI, Leadership Development   |
| Strategy 4.  | Training, Leadership Development  |
| Strategy 5.  | SDBSI, Site Selection, Travel   |
| Strategy 6.  | JRSMLI, Site Selection, Travel  |
| Strategy 7.  | Ethnic Rep at Large, JRSMLI, Research, SDBSI, Strategic Planning, Training                        |
| Strategy 8.  | Conference, JRSMLI, Research, SDBSI, Training, Leadership Development                             |
| Strategy 9.  | State Presidents, Communications, Training  |
| Strategy 10. | State Presidents, Conference, Electronic Services, JRSMLI, SDBSI, Training, Volunteer Development |
| Strategy 11. | President, Past President, Leadership Development   |
| Strategy 12. | Conference, Electronic Services, Historical Archives, JRSMLI, SDBSI, Training                     |
| Strategy 13. | Conference, Electronic Services, Historical Archives, JRSMLI, SDBSI, Training                     |
| Strategy 14. | Conference, Electronic Services, Historical Archives, JRSMLI, SDBSI, Training                     |

**Goal 4. Collect, and then communicate to appropriate decision-makers, the public policy positions of WASFAA region financial aid administrators; provide members with the support and education they need to further their own advocacy efforts.**

**Measures:**

- A. Achieve an annual increase in self-reported advocacy communications from members, including WASFAA, state, and individual communications.
- B. Annually increase advocacy related communications to members.
- C. Evaluate public policy related information from State Presidents' reports.
- D. Increase awareness of public policy issues that impact financial aid administrators in the WASFAA region.

**Strategies/Actions:**

- 1. Communicate advocacy efforts to the membership through the web and social media.
- 2. Educate and empower members to take individual action and help them understand the role they can play in advocacy -- encourage and facilitate communication to elected officials and other key players at the national level, provide members with feedback through the web and social media, and implement easy-to-use web-based tools to support advocacy.
- 3. Collaborate with NASFAA and State Presidents to enhance advocacy efforts at the federal and state levels.
- 4. Work with ATAC to establish a tracking tool to measure and evaluate the impact of actions taken by members.
- 5. Formalize WASFAA's advocacy policy of providing a response and communicating varying viewpoints on key issues, using WASFAA's No-Consensus Policy contained in the P&P when consensus cannot be reached.
- 6. Ensure that state and regional issues brought up in Executive Council meetings are communicated to NASFAA by Executive Council members who serve on the NASFAA Board and NASFAA committees.
- 7. Utilize the Federal Relation Committee in planning the Annual Conference, Jerry R. Sims Management & Leadership Institute, and Sister Dale Brown Summer Institute.

**Committee Responsibilities:**

- Strategy 1. Communications, Federal Relations
- Strategy 2. Communications, Federal Relations, President, President-Elect, Past President
- Strategy 3. State Presidents, Federal Relations, President, Past-President
- Strategy 4. Communications, Electronic Services, Federal Relations
- Strategy 5. President, Segmental Rep at Large, Associate Rep at Large, Federal Relations, Fund Development
- Strategy 6. President, President-Elect, Past President, Federal Relations, State Presidents
- Strategy 7. Federal Relations, Conference, JRSMLI, SDBSI

## Support and Implementation of the Strategic Plan

As with the two previous WASFAA Strategic Plans, the Strategic Planning Committee and the Executive Council will support the plan by its regular use in the decision-making process. It has been effective to have in-person meetings of the Strategic Plan Committee quarterly, before each Executive Council meeting, and it is recommended that this practice be continued. In addition, the 2017-2020 Strategic Plan will be supported by the following:

- Introductory education about the Strategic Plan as an agenda item to be provided at the transition or orientation meeting of the current Executive Council and the incoming Executive Council members.
- WASFAA officer and committee chair goal setting will be coordinated with the four goals of the Strategic Plan. Progress made will be an integral part of each Council member's quarterly and year-end reports.
- Part of the first Executive Council meeting for new members will be utilized to review the recommended strategies and actions that each officer and committee chair should keep in mind when setting and carrying out their goals.
- The Measures Tracking Tool will be updated annually, and all Executive Council members will assist in the timely collection of data. The updated data should be included in the quarterly or year-end report. The Measures Tracking Tool should be reviewed by the Strategic Planning Committee and the Executive Council and evaluated against the desired outcomes.
- Newsletter articles will be written to inform the membership of accomplishments and recent activity regarding the Strategic Plan. Trends and data from the Measures Tracking Tool can be highlighted.

## Appendix A. Strategic Planning Process Participants

Members of the 2016-17 Strategic Planning Committee who participated in the development of the 2017-2020 WASFAA Strategic Plan:

1. Barbara Bickett, Co-chair
2. Jack Edwards, Co-chair
3. Mike Johnson
4. Helen Faith
5. Nicole McMillin
6. Mindy Bergeron
7. Ashley Coleman
8. Steve Herndon
9. Dewayne Barnes
10. Scott Cline
11. Ron Lee
12. Michelle Holdway
13. Ashley Munro

Other participants from the 2016-17 WASFAA Executive Council who participated in the development of the 2017-2020 WASFAA Strategic Plan:

Jannine Oyama  
Shauna Grant  
Mary Frances Causey  
Peter Miller  
Dwight Berreth  
Jennifer Knight  
Shawn Domingo  
Kelley Christianson  
Melissa Moser  
David Downing  
Kay Soltis  
Ashley Salisbury  
Tami Sato  
Sun Ow  
Rick Weems  
Sandi Guidry  
Leonard Walker  
Sarah Everitt  
Thalassa Naylor  
Pat Peppin

**Appendix B: 2017-18 Implementation Matrix**

The goals of the WASFAA 2017-20 Strategic Plan are supported by the 2017-18 goals of each of the Association’s committees as illustrated in the Implementation Matrix below.

**Strategic Plan Goals:**

- 1. Increase the size and engagement of the WASFAA membership.**
- 2. Improve the Association’s operational efficiencies and fiscal controls to achieve a balanced operating budget without the use of asset reserves or carry-forward monies.**
- 3. Provide optimally effective training and professional development opportunities that are responsive to member needs.**
- 4. Collect, and then communicate to appropriate decision-makers, the public policy positions of WASFAA region financial aid administrators; provide members with the support and education they need to further their own advocacy efforts.**

	<b>#1</b>	<b>#2</b>	<b>#3</b>	<b>#4</b>
Past President				
President				
President Elect				
Vice President				
Treasurer				
Secretary				
Rep at Large – Segmental				
Rep at Large – EDAC				
Rep at Large – Associate				
Awards & Scholarships				
Bylaws				
Communications				
Conference				
Electronic Services				
Ethnic Diversity Action				
Federal Relations				
Fiscal Planning				
Fund Development				
Historical Archives				
Jerry R. Sims MLI				

	<b>#1</b>	<b>#2</b>	<b>#3</b>	<b>#4</b>
Leadership Development				
Membership				
Nominations & Elections				
Policies & Procedures				
Research				
Sister Dale Brown SI				
Site Selection				
State Presidents' Group				
Strategic Planning				
Training				
Travel				
Volunteer Development				

**Appendix C: Measures Tracking Tool**

**WASFAA 2017-2020 Strategic Plan Measures Tracking Tool**

The Strategic Planning Committee is responsible for ensuring that the Strategic Plan is monitored effectively and that progress is tracked accurately and consistently. This tool assists in tracking progress toward the Plan’s key measures on an annual basis.

<b>Goal #1</b>						
<b>Increase the size and engagement of the WASFAA membership.</b>						
	<b>2017/18</b>	<b>2018/19</b>	<b>2019/20</b>			
<b>A. Increase the number of WASFAA members. (track number of members and new members added to membership from each training event)</b>						
Marketing Strategy Complete or Updated	Yes/No	Yes/No	Yes/No			
# of Membership Renewals						
# of WASFAA Logo Items Sold						
# of Scholarships Provided						
Mentorship Program (# of mentors and mentees)						
# of Individual vs. Institutional Members						
Fall Training						
Winter/Spring Training						

Pre-Conference Event						
JRSMLI						
SDBSI						
Annual Conference						
<b>Totals</b>						
<b>B. Increase the attendance at the Annual Conference, when reasonable given the conference location. (track number and method of promotions, e.g., 6 emails, 2 articles in newsletter)</b>						
Annual Conference Promotion (frequency)						
Newcomer's Reception Number of Attendees						
Annual Conference Number of Attendees						
<b>Totals</b>						
<b>C. Achieve and maintain optimal attendance at Sister Dale Brown Summer Institute and Jerry R. Sims Management &amp; Leadership Institute to ensure both cost-effectiveness and quality of participant experience. (track number and method of promotion, track number of attendees planned for vs. actual)</b>						
Promotion for JRSMLI (frequency)						
Promotion for SDBSI (frequency)						



JRSMLI Attendance						
SDBSI Attendance						
<b>Total attendees</b>						
<b>D. Achieve annual increases in volunteer engagement, as indicated by participation on committees, writing newsletter articles, posting to social media, participating in advocacy efforts, and doing research. (track overall total of volunteers and total of new volunteers annually)</b>						
Promotion of Volunteer Opportunities						
Total # of Volunteers/ Total # New Volunteers						
<b>Goal #2</b>						
<b>Improve the Association's operational efficiencies and fiscal controls to achieve a balanced operating budget without the use of asset reserves or carry-forward monies.</b>						
	<b>2017/18</b>	<b>2018/19</b>	<b>2019/20</b>			
<b>A. Decrease the use of asset reserves/carry forward each year, resulting in a balanced 2020 operating budget.</b>						
Asset Reserves/Carry Forward Budgeted vs. Used						
# of EC Meetings						
# of Committee Meetings by Conference Calls						

<b>B. Balance budgets for all activities (except Training Committee events, which will continue to be subsidized) exclusive of sponsorships by 2020. (track budget vs. actual expenses for events)</b>						
Establish Chair and Vice Chairs						
Site Locations Optimized						
Tier Pricing for Sponsorships						
Travel Committee Arranges All EC Travel						
JRSMLI						
SDBSI						
Conference						
<b>C. Evaluate growth of investments compared to annual goals, dictated and adjusted as needed per market forces. (track growth percentage annually)</b>						
Growth in Charles Schwab Investment						
Growth in Vanguard Investment						
<b>Goal #3</b>						
<b>Provide optimally effective training and professional development opportunities that are responsive to member needs.</b>						
	<b>2017/18</b>	<b>2018/19</b>	<b>2019/20</b>			
<b>A. Increase the participation in training activities. (tracking number of participants to compare year over year, track events posted to ATAC and activities posted to Online Training Library)</b>						
Fall Training						

Winter/Spring Training						
JRSMLI						
SDBSI						
Annual Conference						
Total Webinars Posted to ATAC						
Total Conference Presentations Posted to ATAC						
Training Library on ATAC						
Diversity Training Events						
<b>Totals</b>						
<b>B. Evaluate post-event participant survey results utilizing the Core Assessment Questions for Evaluation of WASFAA Events contained in the WASFAA P&amp;P, Appendix C. (track if completed and number of responses)</b>						
Participation Survey Completed						
Fall Training						
Winter/Spring Training						
JRSMLI						
SDBSI						
Conference						
<b>C. Recruit two new trainers to Sister Dale Brown Summer Institute and one trainer for Jerry R. Sims Management &amp; Leadership Institute annually; achieve annual mix of veterans (four or more years of training experience), experienced (one to three years of training experience), and new (no previous training experience) trainers at all training events. (track total number of trainers and number of new trainers)</b>						
JRSMLI						
SDBSI						
Training						

<b>D. Continue to offer new fall and spring trainings each year based on current topics of interest to financial aid community members. (track if done)</b>						
Fall Training						
Winter/Spring Training						
<b>E. Create a leadership pipeline program by 2020.</b>						
Leadership Committee Formed						
# of Participants in Mentorship Programs						
Train the Trainer Program						
<b>Goal #4</b>						
<b>Collect, and then communicate to appropriate decision-makers, the public policy positions of WASFAA region financial aid administrators; provide members with the support and education they need to further their own advocacy efforts.</b>						
	<b>2017/18</b>	<b>2018/19</b>	<b>2019/20</b>			
<b>A. Achieve annual increase in self-reported advocacy communications from members, including WASFAA, state, and individual communications. (track if survey completed and number of responses, track number of letters drafted, track creating and updating of Advocacy Toolkit)</b>						
Survey Membership on Number of Advocacy Letters Sent to Congress						
Letters Drafted on Behalf of EC and Sent to Congress						

Letters Drafted for EC Review not Receiving Consensus						
ATAC Tracking						
Advocacy Website Toolkit						
<b>B. Increase advocacy-related communications to members annually. (track number of communications sent out annually)</b>						
# of Web/Social Media Notifications						
Newsletter Articles						
Email Notifications						
Advocacy Training Events						
# of Members Participating in NASFAA Hill Visits						
<b>C. Evaluate public policy related information from State Presidents' reports. (review and track number of issues by state)</b>						
# of Issues Tracked						
<b>D. Increase awareness of public policy issues impacting financial aid administrators in the WASFAA region. (track percentage increase year to year)</b>						
Newsletter Articles						
Email Notifications						
Social Media						
Web						

**Key Miscellaneous Data**

	<b>2017/18</b>	<b>2018/19</b>	<b>2019/20</b>			
Bylaw Changes						
Revisions or Updates to P&P						
Average Monthly Hits on Website						
Total Annual Hits to Website						
Most/Least Popular site						
Review of Investment Strategy						
Sources and Amounts of Revenue streams						
Monthly Reconciliation Completed	Yes/No	Yes/No	Yes/No			
Attempting to Achieve Equitable Representation in Elections						
# of EDAC Participants in Mentor Program						



<b>Committee/Officer</b>	<b>Goal #</b>	<b>Data Needed</b>
Awards/Scholarships	1A	Number of members applying for scholarships/ number awarded
Communications	1A	Number of communications sent to membership by web
	1A	Number of newsletters published
	1A	Number of communications from president
	1A	Number of communications sent by email
	1A	Number of communications sent for JRSMLI, SDBSI, Training
Conference	1A, 1B	Number of attendees; pre-conference
	3B	Evaluation results (improvements in quality/consistency)
Electronic Services	Misc.	Average monthly hits to website
	Misc.	Total annual hits to website
	Misc.	What pages receive the most and least number of hits
	3A	Number webcasts posted to ATAC
	3A	Number of conference interest sessions posted to ATAC
	3A	Number of WASFAA training materials posted to Training Library on ATAC
Federal Relations	4B	Number of newsletter articles, emails messages sent
	4A	Number of letters or position papers drafted
	4A	Number of members responding to call to action by FRC
	4A	Number of member advocacy letters sent to Congress
	4B	Number of members participating in NASFAA Hill visits
	4A	Advocacy toolkit created/updated
Fiscal Planning	Misc.	Reviewed Investment strategy
	Misc.	Number of sources of revenue
Fund Development	2B	Tier pricing for sponsorships
Historical Archives	Misc.	Number of items in storage available for sale
JRSMLI	1A/1C	Number of attendees
	3C	Number of faculty and new faculty trainers
	3B	Evaluation results (improvements quality/consistency)
Leadership Development	3E	Number of mentors and mentees in mentorship program
	3E	Train the Trainer program established/number of events
Membership	1B	Number of attendees at Newcomer Event
	1A	Number of members in different ethnic/racial categories
	1A	Marketing strategy complete or updated
	1A	Number of membership renewals
	1A	Number of WASFAA logo items sold
Nominations and Elections	Misc.	Attempt to achieve equitable representation in elections
Past President	4D	Number of regional reports to NASFAA board
President	Misc.	Number of state conferences attended/presented
	2B	Number of in-person EC meetings and EC conference call meetings
	2B	Number of chairs and vice chairs
President Elect	Misc.	Bylaw changes
	Misc.	Revisions to P&P
Rep at Large – Associate	4C	Number of advocacy topics for sector
Rep at Large – EDAC	3A	Number of diversity-related activities conducted
	3C	Number of diversity training events
	1A	Number of EDAC scholarship applications received for each event and number of scholarships awarded
	Misc	Number of EDAC members in mentor program
Rep at Large – Segmental	4C	Number of advocacy topics for sector



<b>Committee/Officer</b>	<b>Goal #</b>	<b>Data Needed</b>
Research	Misc.	Number of surveys conducted
SDBSI	1A/1C	Number of attendees
	3C	Number of Faculty and new faculty
	3B	Evaluation results (improvements in quality/consistency)
Site Selection	2B	Current contractual obligations
	2B	Site location optimization
State Presidents Group	4C	Number of advocacy issues impacting each state
	4B	Number of state members participating in NASFAA Hill visits
Training	3A	Number of attendees/events (in person or webinars)
	3C	Number of trainers and new trainers
	1A	Increase membership participation in events
	3B	Evaluation results (improvements in quality/consistency)
	3E	Train the Trainer program established
	3D	Number of training events
Travel	2B	Number of travel arrangements made for EC meetings
Treasurer	2A	3-year operating average, current asset reserves
	2A	Growth in Charles Schwab and Vanguard accounts
Vice President	1A	Purchase of WASFAA logo items
	Misc.	Reconciliation completed Yes/No
Volunteer Development	1B	Number of attendees
	1D	Number of volunteers on committees, number of new to position
	1D	Number of promotional communications, web, email, newsletter articles, and social media