

# NAFA Strategic Plan: Draft Action Plan for Implementation | 2009

| Recommendation  | Action Steps  | Time Line             | Committee<br>(**Asterisks indicate that this is an ad-hoc rather than a standing committee) |
|---|---|-----------------------|---|
| Develop strategies for the manageable growth of NAFA                            | Create a Membership Committee   | July 2009             | Executive Board   |
|   | Create Membership Committee to: <ol style="list-style-type: none"> <li>1. Assess underrepresented constituencies</li> <li>2. Develop marketing materials</li> <li>3. Evaluate incentives to encourage more foundation members</li> <li>4. Develop guidelines for foundation memberships</li> <li>5. Develop plan for conducting outreach to other professional organizations (NCHC, NAFSA, etc.)</li> </ol> | July 2010 and ongoing | Membership Committee**  |
| Evaluate existing committee structures and procedures for recruiting volunteers | Examine requirements for committees and make changes if needed  | July 2010             | Executive Board   |
|   | Develop criteria to evaluate which and how many standing committees we can staff effectively  | July 2010             |   |

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|   | Decide whether president should oversee committees or: <ol style="list-style-type: none"> <li>1. Reduce the # of committees by combining related functions; or</li> <li>2. Assign oversight of some committees to other Board members</li> </ol> | July 2010, and ongoing           |                     |
|   | Develop mechanism and strategies for managing volunteers   | January 2010                     |                     |
|   | Encourage members not on the Board to participate in committees  | Ongoing                          |                     |
| Maintain, develop, and enhance advisor relationships with foundations | Create information packet for new foundations  | December 2009                    | Executive Board     |
|   | Hold foundation meeting at biennial conferences  | July 2009, 2011, and 2013        |                     |
|   | Consider the following ideas: <ol style="list-style-type: none"> <li>1. Reduce fees for foundation members</li> <li>2. Ombuds Committee</li> </ol>   | December 2009                    |                     |
| Provide guidelines for an ethical approach to scholarship advising    | President constitutes Ethics Task Force  | Completed July 2007              | Ethics Task Force** |
|   | Ethics Task Force develops core ethical values and drafts code of ethics   | Completed spring and summer 2008 |                     |
|   | Executive Board reviews draft  | Completed December 2008          |                     |
|   | Draft distributed to NAFA members for comments   | Early June 2009                  |                     |
|   | Ethics Task Force collects/reviews suggestions from members  | June 2009                        |                     |
|   | Board approves final draft and submits to members for vote   | July 2009                        |                     |
| Assess and address the needs of experienced advisors and new advisors | Recruit new or previously uninvolved advisors for NAFA committees  | January 2010                     | Executive Board     |
|   | Reevaluate Mentorship program  | December 2009                    |                     |

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|   | Create more professional development opportunities for experienced advisors  | January 2011   |  |
| Support professional development programs   | Form Professional Development Committee to: <ol style="list-style-type: none"> <li>1. Explore mentoring program for new advisors</li> <li>2. Develop certificate for professional excellence</li> </ol>  | January 2009   | Professional Development Committee**   |
|   | Create Professional Development Boot camp for July 2009 meeting  | Spring-early summer 2009   |  |
|   | Develop Annual Surveys of the Profession   | 2009-2014  |  |
| Assess NAFA programs (biennial conferences, and summer workshops, and overseas study tours)                 | Assess current committee structures  | December 2009  | Executive Board, Conference Planning Committee, Study Abroad Committee**, Summer Workshops Committee** |
|   | Create unified survey for events   | December 2010  |  |
|   | Develop manuals for event planning   | December 2010  |  |
|   | Create mechanism for disseminating event materials/learning outcomes   | December 2012  |  |
|   | Create mechanism for disseminating survey results to conference planners   | December 2012  |  |
|   | Explore insurance needs  | December 2009  |  |
|   | Create Professional Development Boot camp for July, 2009 meeting   | Spring 2009  |  |
|   | Develop Annual Surveys of the Profession   | 2009-2014  |  |
| Assess our financial situation and determine approach for ensuring the long-term health of the organization | Form Finance Committee   | July 2009  | Executive Board  |
|   | Finance Committee will explore: <ol style="list-style-type: none"> <li>1. Options for reserve fund</li> <li>2. Alternative sources of revenue</li> <li>3. Support for biennial conferences</li> <li>4. Hiring additional employees</li> <li>5. Investment in a new Website</li> </ol> Additional programs and expenses | July 2010 and ongoing<br>*Staff support for Seattle conference was approved in December 2008 | Finance Committee  |

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|   | Contract with CVENT for 2-year trial  | Completed November 2008  | Executive Board  |
|   | Adhere to the following policies <ol style="list-style-type: none"> <li>1. Continue to provide staff support for treasurer</li> <li>2. Continue to use a university financial office to ensure best practices/open records</li> <li>3. Continue to fund Board members' travel to board meetings and essential committee meetings</li> </ol> | Ongoing                  | Executive Board  |
| Develop technological tools to assist advisors in providing sound advice, including an up-to-date Website | Form Technology Committee   | January 2010             | Executive Board  |
|   | Conduct technology survey   | July 2010                | Technology Committee**   |
|   | Develop online peer advising system   | July 2010                | Technology Committee**, in collaboration with Professional Development Committee**                                     |
|   | Revamp existing Website to include: <ol style="list-style-type: none"> <li>1. Basic information</li> <li>2. Searchable scholarships database</li> <li>3. Best practices</li> <li>4. Updated bulletin board</li> <li>5. Site use tracking tools</li> </ol> Methods for performing in-house updates   | January 2011 and ongoing | Technology Committee**, drawing on recommendations completed in December 2008 by T. Yglesias, D. Cutchins, A. Eckhardt |
|   | Revamp use of listserv  | January 2011             | Executive Board  |
| Support and maintain NAFA publications  | Create Publications Committee   | July 2009                | Executive Board  |

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|   | <p>Publications Committee will explore:</p> <ol style="list-style-type: none"> <li>1. Benchmarking publications from other organizations</li> <li>2. Strategies and processes for engaging membership</li> <li>3. Attainable publication dates/publication calendar</li> <li>4. Criteria for selection of articles</li> <li>5. Online submission processes</li> <li>6. Creating a unified look for NAFA publications</li> </ol> | <p>January 2011 and ongoing</p> | <p>Publications Committee</p>                  |
| <p>Review the Action Plan and develop new strategies for strategic plan implementation as the need arises</p> |   | <p>Ongoing</p>                  | <p>Executive Board and relevant committees</p> |