

**The Educational Opportunity Fund  
Professional Association, Inc.**

**New Jersey**



**REDESIGNING  
OUR NARRATIVE**

**ACTION AND IMPACT**

**Strategic Plan**

**2016 – 2018**



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# EOFPANJ

**The Educational Opportunity Fund Professional Association, Inc.- New Jersey**

## **Message from the Board**

Greetings!

On behalf of the Executive Board Members of The Educational Opportunity Fund Professional Association, Inc. of New Jersey (EOFPANJ), we are honored to present the EOFPANJ Strategic Plan for the years 2016-2018.

Throughout our rich history, EOFPANJ has presented great opportunities and challenges. We have managed to emerge from each challenge more committed, capable, vibrant and with increased quality to meet our mission-critical goal of serving our constituency.

The current educational landscape and environmental climate requires us to exert an increasing influence across the State and, in particular, to forge a strong, effective advocacy agenda that will address a growing need to practice collective efficacy to preserve our programs, irrespective of campus.

This strategic plan is the result of the dedicated work of many volunteers and staff. The content will help inform program and operational level planning, support resource allocation decisions over the next two years, and provide the groundwork for a successor plan to continue movement toward action and impact.

While this plan is a dynamic document to which changes may be made, we anticipate we will unceasingly focus on the needs of our members, students, and other stakeholders we serve to help move them closer to realizing the full potential of opportunity programs everywhere. We are proud to have been a part of this process.

Sincerely,

**Alex Delgado**  
Board President



## About EOFPANJ

*Advancing College  
Access,  
Affordability,  
& Success for  
Underrepresented  
Scholars*

The Educational Opportunity Fund Professional Association, Inc. of New Jersey (EOFPANJ) is a non-profit organization that represents professional staff from 56 undergraduate colleges and universities throughout the State.

Its membership, which includes directors, administrators, educators, and counselors, provides academic and holistic student support services to more than 12,500 students, assisting them in obtaining an equitable and comprehensive education leading to professional certificates, associate, baccalaureate, and advanced degrees.

The EOFPANJ sponsors annual conferences, a Counselor's Training Institute, cohost the biennial Tri-State Consortium Conference where members and professionals in the field of higher education network, engage in meetings, workshops and impart best practices to enhance program operations.

Since 1968, campus EOF program have worked diligently to provide its students with the access, resources and support to earn a college education in New Jersey. Over the past 48 years, the EOF program has successfully weathered changes on the institutional and state levels. As we embark on EOF's next 50 years, we realize we must work unceasingly to ensure all campus programs have the fiscal and human support necessary to achieve new paradigms of success.

EOFPANJ works closely with the Educational Opportunity Fund Statewide Alumni Association, the Association of EOF Students of New Jersey and the Tri-State Consortium of Opportunity Programs in Higher Education to foster a community dedicated to educational and professional excellence. Learn more about us at [eofpanj.org](http://eofpanj.org).



## EOFPANJ Vision Statement

Advancing college access, affordability and success for underrepresented scholars.

## EOFPANJ Mission Statement

To be the official liaison of the Educational Opportunity Fund (EOF) campus-based programs, the Office of the Secretary of Higher Education, and the EOF Executive Board Members.

## Mission Imperative Goals

**+ Advocate on behalf of EOF programs**  
which serve educationally and economically disadvantaged students.

**+ Monitor and track legislation and policy**  
decisions that may have a direct or indirect affect upon the EOF constituency.

**+ Provide a venue for professional development**  
of its members and a clearinghouse of resources relevant to the achievement of our mission.

## Our Core Values

**+ Leadership**  
**+ Accountability**  
**+ Reliability**

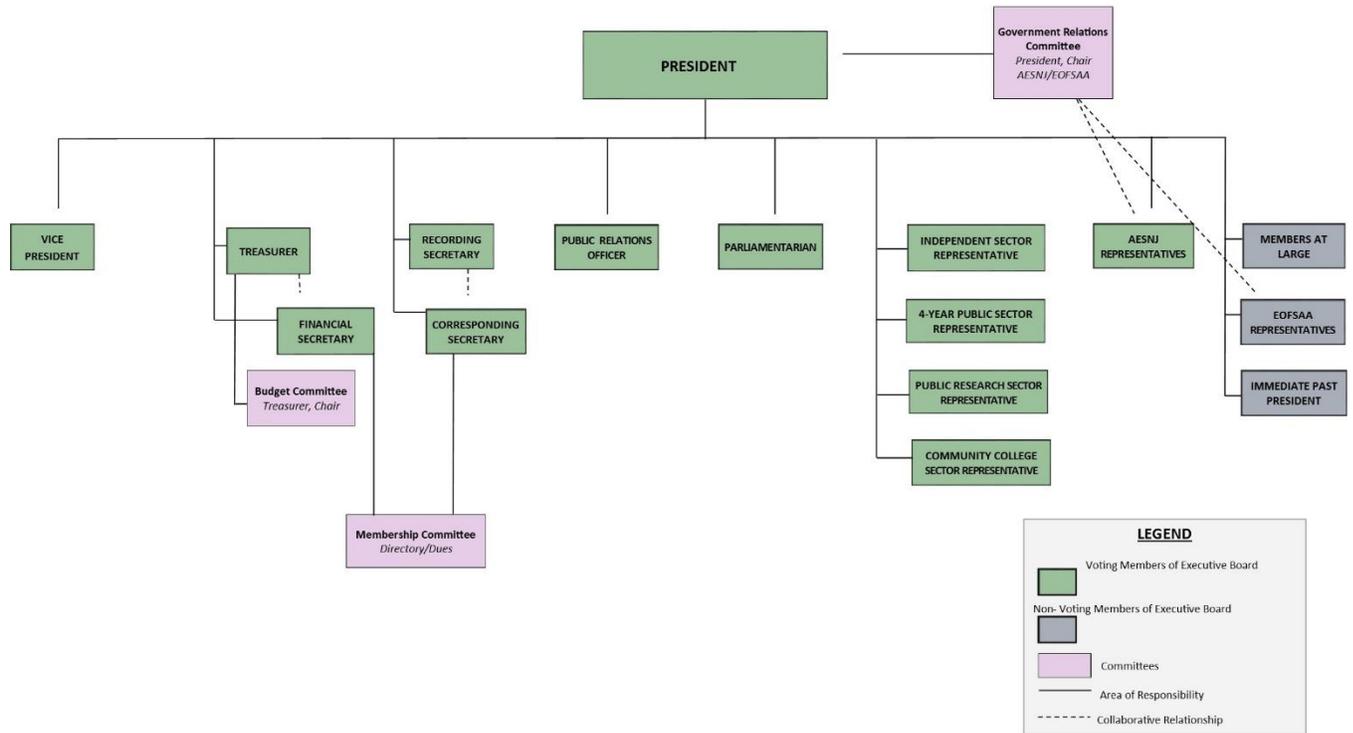
**+ Vision**  
**+ Collaboration**  
**+ Self-less Service**

**+ Integrity**  
**+ Commitment**  
**+ Effectiveness**



# EOFPANJ Organizational Structure

Organizational Chart A: Executive Board





## The Strategic Planning Process

EOFPANJ's 2016-2018 strategic planning process began on September 24, 2015 during the Fall Executive Board Members' Retreat at the Resorts Hotel in Atlantic City, New Jersey. The process included an overview and initiation of the need and desire to commit to the strategic planning process, identification of core values, engagement in thought-provoking dialogue, including participation in a mini future search, assembly of a list of our stakeholders (internal and external), distribution of a membership survey, two member focus groups, and personal interviews and more. The method utilized was intentional about gathering information from a variety of sources that would provide insight into strengths, challenges, threats and opportunities for the future direction of EOFPANJ.

We appreciate the time, effort and dedication of the Strategic Planning Committee members. Particular thanks to Edith A. Corbin, for facilitating the discussion, decision making process and crafting the plan. Her commitment to the process (and her patience) was invaluable. Thank you!

### Strategic Planning Committee Members

**Alex Delgado**  
President

**Reuben Melendez**  
Parliamentarian

**Dr. Marsha Besong**  
Sector Representative  
Public Research Colleges &  
Universities

**Brett Pulliam**  
Vice President

**Simone Mack-Bright**  
Public Relations Officer

**Farah Pelissier**  
Treasurer

**Barbara Harmon-Francis**  
Member-at-Large

**Mona Davis  
& Louis Marius, Jr.**  
Sector Representatives  
Community Colleges

**Dr. Jenice Sabb**  
Financial Secretary

**Vivian Zambrano**  
Sector Representative  
State Colleges & Universities

**Jasmin McMillion**  
Advisor, AESNJ

**Billie Bailey**  
Recording Secretary

**Florangel Cabrera**  
Sector Representative  
Independent Colleges &  
Universities

**Dr. Dawn Singleton**  
Sector Representative  
Public Research Colleges &  
Universities



## **EOFPANJ 2016-2018 Strategic Goals and Objectives**

Based on the input from a broad range of stakeholders, the list below summarizes the EOFPANJ investment and voting priorities of strategic goals identified and voted on by the Executive Board on September 24, 2015.

We have identified frames for action and strategic objectives reflect the outcome or impact of the broader strategic goals for action planning.

A board member and/or committee chair has been appointed as the goal leader for each frame of action strategic goal. As such, the appointed board member and/or committee chair is responsible for managing the strategic goal and corresponding objectives, and reporting progress to the Executive Board, including regular milestones, pockets of greatness, and a reconciliation of all activities on or before the expiration of this Strategic Plan.

### **Strategic Imperative #1 - Programs/Services**

### **Strategic Imperative #2 – Governance**

### **Strategic Imperative #3 - Fiscal Responsibility**

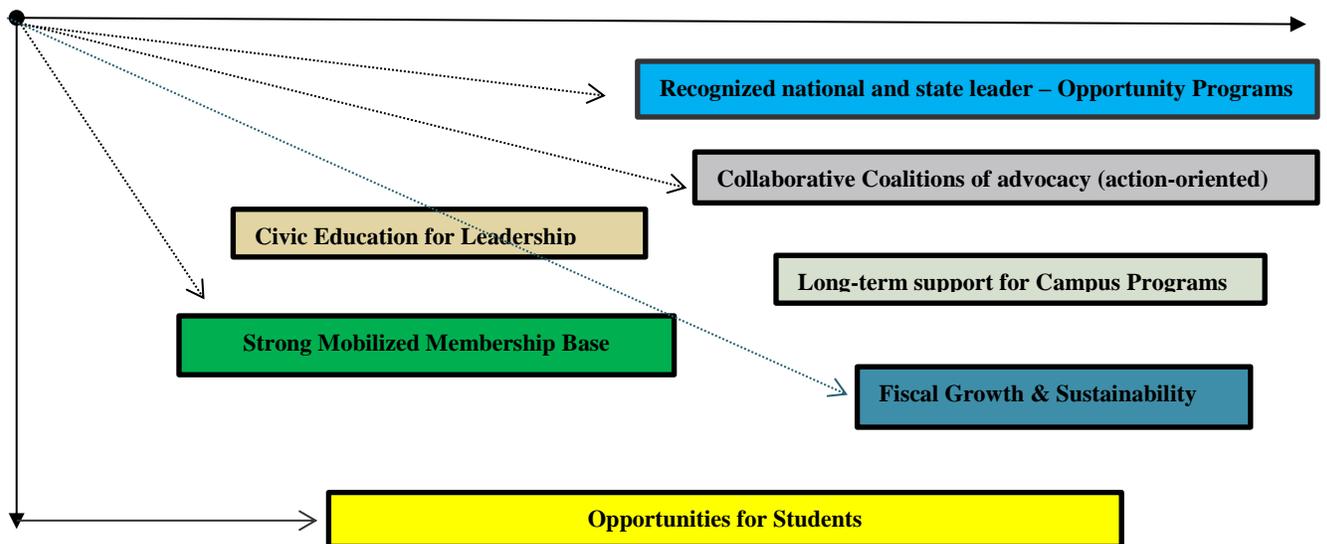
### **Strategic Imperative #4 - Government Relations, Advocacy and Public Policy**



# FRAMES OF ACTION DEFINED BY STRATEGIC IMPERATIVES



## Scale of Innovation to Evolve





<b>⚡ Strategic Imperative #1 - Programs/Services</b>	
<b>Goal: Revitalize and elevate EOFPANJ membership base to expand reach, participation, enrich engagement and improve retention</b>	
<b>Who is Responsible: Board of Directors, Membership Committee</b>	
<b>Strategy</b>	<b>Review current membership model to affirm purpose and value of membership to EOFPANJ</b>
<b>Primary Objectives</b>	Implement a process to identify and recruit new members from all sectors, including members with specific knowledge/expertise (accounting, law, fundraising, policy, strategist)
<b>Indicators of Success</b>	Membership satisfaction, engagement and success Membership growth and professional development
<b>Performance Metric</b>	2% increase in membership enrollment 75% of membership report satisfaction with overall EOFPANJ services and programs 75% of membership participate in conferences, events, seminars
<b>Strategy</b>	<b>Assess core competencies and identify opportunities for membership to be engaged to share core competencies</b>
<b>Primary Objectives</b>	Placement of members on committees and/or Board of interest
<b>Indicators of Success</b>	Membership accepts/fulfills assignments - volunteer committees, BOD succession planning including to Tri-State or Central Board of Directors
<b>Performance Metric</b>	10% of membership identified as the lead presenter at one professional development event by FY 18

**Strategic Imperative #1 - Programs/Services****Goal: Review and expand signature programs and services to provide innovative responses to pressing needs of all stakeholders****Who is Responsible: Board of Directors, Programs Committee, Marketing Committee**

<b>Strategy</b>	<b>Assess current programs and ancillary organizations to strengthen alignment for 21<sup>st</sup> century</b>
<b>Primary Objectives</b>	Conduct assessment to identify pertinent program priorities and opportunities to streamline or combine services
<b>Indicators of Success</b>	Formal program plan (and outcomes logic model) are presented to BOD for adoption annually that is aligned with the budget and also identifies specific outcomes for each programmatic area
<b>Performance Metrics</b>	Implementation of two collaborative projects by FY19 Outcomes are available to track success or impact of programs/services to support fundraising efforts 100% Committees held responsible for producing outcomes in alignment with budget
<b>Strategy</b>	<b>Explore credentialing for EOF Directors (as practitioners of excellence in education)</b>
<b>Primary Objectives</b>	Establish an ad hoc committee to conduct research on the credentialing process for EOF Directors
<b>Indicators of Success</b>	Completed White Paper regarding credentialing process completed by FY17
<b>Performance Metric</b>	Feasibility of an established credentialing process/recommendations are made to EOFPANJ BOD by FY18 for further action
<b>Strategy</b>	<b>Plan and implement 50<sup>th</sup> Anniversary Gala/EOF</b>
<b>Primary Objectives</b>	Establish an ad hoc committee to frame the Celebration of Success - 50 years of Opportunity Programs in NJ
<b>Indicators of Success</b>	Implementation of 50 <sup>th</sup> Anniversary Gala – 500+ attendees Share the vision, mission, impact with new stakeholders
<b>Performance Metric</b>	90% of EOF Campus programs are represented at gala 25% of legislators attend gala 25% EOF alumni attend gala \$30,000 net income from gala



## ✦ Strategic Imperative #2 – Governance

**Goal: Furnish a governing structure to supports execution of EOFPANJ mission and purpose**

**Who is Responsible: President, BOD, Bylaws, Membership, Transition Committees**

<b>Strategy</b>	Research best practices in nonprofit management and establish a structure that supports both operations, management, advocacy and succession planning
<b>Primary Objectives</b>	<p>Established Vice Presidents support succession 1stVP-Programs, 2ndVP-Membership, 3rdVP Sectors</p> <p>Elevate the roles and mission related to programs to a new level across the organization</p> <p>Assure organization completes the process to elect and transition officers / board members within timely fashion according to Bylaws</p>
<b>Indicators of Success</b>	Reframed Bylaws to enhance operations, including effective committee operations, and implementation of programs/services
<b>Primary Metric</b>	<p>Annual review of Bylaws</p> <p>Revised Bylaws established by end of FY17</p> <p>Revised organizational structure voted/established by early FY18</p> <p>80% of members report understanding of and appreciation for streamlined governance</p>



<b>➤ Strategic Imperative #2 – Governance</b>	
<b>Goal: Build the organizational capacity necessary to fulfill the EOFPANJ mission</b>	
<b>Who is Responsible: President, Marketing and Communications Committee</b>	
<b>Strategy</b>	<b>Conduct annual Board and Member Orientation</b>
<b>Primary Objectives</b>	Ensure Board members understand the mission, purpose and direction of the organization, including fiscal protocols and use data to make decisions  Ensure each member is equipped with a membership handbook containing all necessary materials (Roberts Rules, Charter, Bylaws)
<b>Indicators of Success</b>	Orientation completed in FY17 and FY18
<b>Primary Metric</b>	100% of BOD comply with Roberts Rules, Rules of Parliamentary Procedure and BOD expectations detailed in Bylaws
<b>Strategy</b>	<b>Invest in professional development of Parliamentarian (certification)</b>
<b>Primary Objectives</b>	Enhance knowledge of Parliamentarian to conduct meeting decorum training Support succession planning and effective Board transition process within 45-days of election
<b>Indicators of Success</b>	Meetings are conducted in accordance with Bylaws and Roberts Rules of Order Board members are held accountable to a standard and expectation
<b>Primary Metric</b>	Organization remains compliant with Bylaws, protocols, and meeting time is reduced by 10% Parliamentarian is the expert source to address organizational issues
<b>Strategy</b>	<b>Invest in brand marketing to identify ways to accelerate growth</b>
<b>Primary Objectives</b>	Position the brand, messaging and voice of EOFPANJ as the expert source in New Jersey for opportunity programs



<b>Indicators of Success</b>	Increase in stakeholder touchpoints Revised/updated website, business cards, social media
<b>Primary Metric</b>	30% increase in awareness of EOFPANJ mission and purpose

<b>✚ Strategic Imperative #3 - Fiscal Responsibility</b>	
<b>Goal: Achieve fiscal stewardship and gold star governance</b>	
<b>Who is Responsible: BOD, Treasurer, Financial Secretary, Finance and Fund Development Committees</b>	
<b>Strategy</b>	<b>Create and adopt a written fiscal protocol manual</b>
<b>Primary Objectives</b>	Best practice in nonprofit to adhere to general acceptable accounting principles and fiscal integrity  Identify a fiscal management system for internal controls, procurement, administrative rules, cash management, or use of credit.  Secure financial planning and reporting to government, donors, and members  Support fiscal planning and accountability (generation of monthly reports, year-end reconciliation, variances in reporting, filing of 990's, etc.).
<b>Indicators of Success</b>	Strong reporting and accounting system in place for properly adhering to fiscal regulations of the organization  Identified procedure to empanel an audit committee of volunteers or outsource audit function following completion of term
<b>Primary Metric</b>	Fiscal management system and written policies that support effective controls and accountability of all funds and assets entrusted to the organization, and compliance with the law.

**✚ Strategic Imperative #3 - Fiscal Responsibility****Goal: Generate and preserve the resources necessary to sustain the EOFPANJ operations.****Who is Responsible: President, Budget/Finance Committee and Fundraising Committee**

<b>Strategy</b>	<b>Cultivate donors and prospective sponsors to support the mission</b>
<b>Primary Objectives</b>	Generate association sponsorships for conferences and special events to support organizational operations
<b>Indicators of Success</b>	Visibility and established funding sources, including advertisements or conference sponsorships
<b>Primary Metric</b>	10% increase in revenue generated through donor cultivation
<b>Strategy</b>	<b>Establish a practice to archive information and data</b>
<b>Primary Objectives</b>	Maintain a central repository of association history, photographs, artifacts, and outcomes data (including advocacy efforts)
<b>Indicators of Success</b>	History and archived records are accessible as evidence of the legacy of the organization for annual reporting and other purposes
<b>Primary Metric</b>	Organized strategy (cloud based or flash drive) in place by FY17



<b>➤ Strategic Imperative #4 - Government Relations, Advocacy and Public Policy</b>	
<b>Goal: Elevate members' collective efficacy to deepen and expand our advocacy voice</b>	
<b>Who is Responsible: President, Advocacy Committee, Membership Committee, and Marketing Committee</b>	
<b>Strategy</b>	<b>Elucidate public policy as our core mission by developing an advocacy toolkit</b>
<b>Primary Objective</b>	Educate board and members on advocacy 101 for EOFPANJ. Distribute the toolkit as a resource and guide related to outreach to legislators
<b>Indicators of Success</b>	Strong letter or email communication campaign to all legislators Repository of information of EOFPANJ advocacy efforts Collaboration with others to invoke dialogue
<b>Primary Metric</b>	20% response rate from legislators receiving contact information 50% of EOFPANJ members are equipped with the advocacy tool kit to support implementation of the advocacy agenda
<b>Strategy</b>	<b>Implement Student Day at the Capitol</b>
<b>Primary Objective</b>	Educate students on the legislative process
<b>Indicators of Success</b>	150 students in attendance – FY17-18
<b>Primary Metric</b>	10% of students provide oral testimony annually 80% of participants report enhanced knowledge regarding the civic process
<b>Strategy</b>	<b>Convene leadership meetings with Secretary of Higher Education, Board of Directors, and Legislators</b>
<b>Primary Objective</b>	Advocate for EOF campus programs
<b>Indicators of Success</b>	Commitment to support for EOF Programs Regulations are designed to support EOF programming
<b>Primary Metric</b>	5% increase in number of meetings convened by FY18
<b>Strategy</b>	<b>Attend Annual Budget Hearings (Assembly &amp; Senate)</b>
<b>Primary Objective</b>	Provide testimony and advocate for EOF leadership
<b>Indicators of Success</b>	Increase in fiscal funding for EOF EOFPANJ members invited to serve on various boards or committees



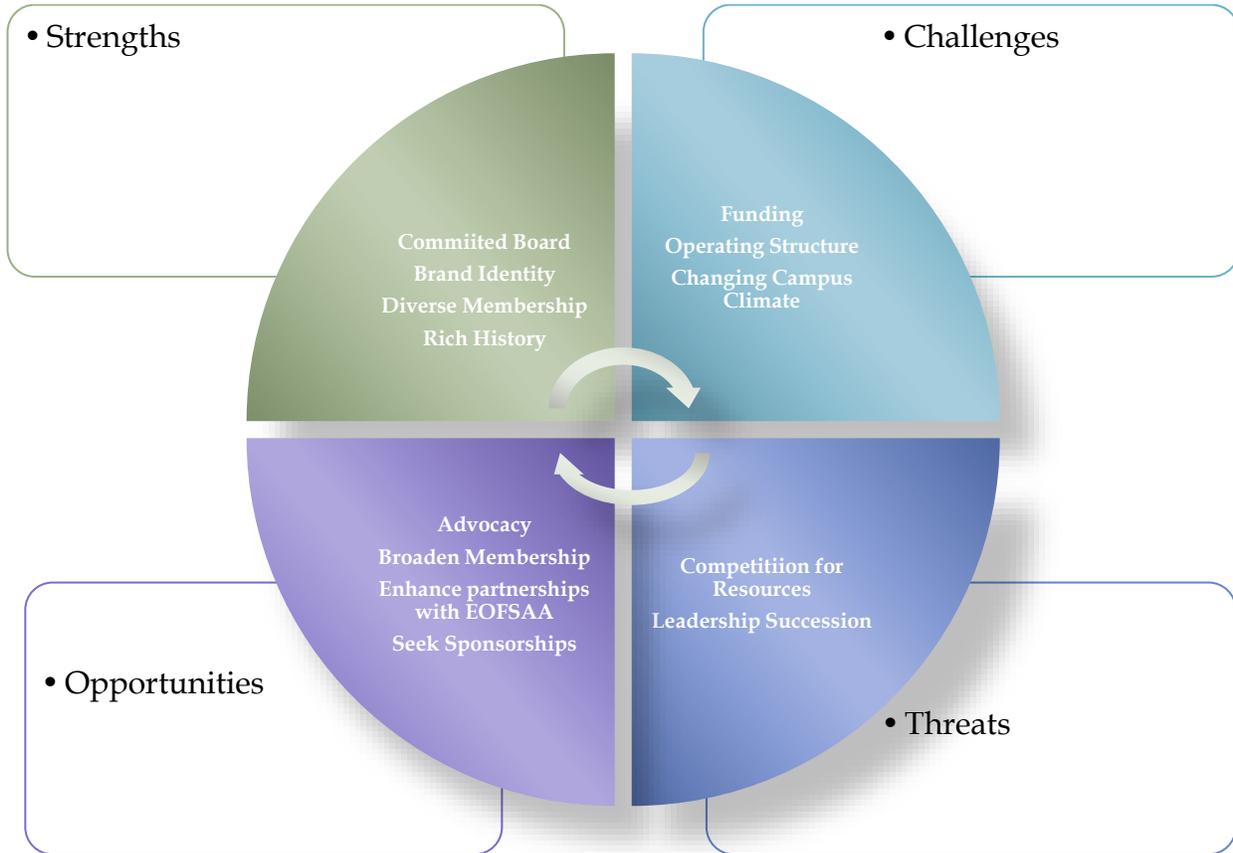
<b>Primary Metric</b>	Board President delivers testimony at (3) scheduled budget hearings seeking 10% increase by FY18
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<b>➤ Strategic Imperative #4 - Government Relations, Advocacy and Public Policy</b>	
<b>Goal: Develop a written advocacy agenda, including a plan for distribution to and engagement with all legislative and other stakeholders.</b>	
<b>Who is Responsible: President, Advocacy Committee and Membership Committee</b>	
<b>Strategy</b>	<b>Create an action-focused policy agenda to publicize our advocacy initiatives in a formal method</b>
<b>Primary Objective</b>	Advance our profile as a statewide advocacy group among legislators and stakeholders (remaining non-partisan)
<b>Indicators of Success</b>	Agenda is distributed to 50% of the stakeholders Enhanced knowledge, commitment and impact of EOFPANJ and EOF model (college educated public, workforce development, best-practice model)
<b>Primary Metric</b>	10% increase in visibility of brand 10% increase in fiscal funding for EOF campus programs by FY19
<b>Strategy</b>	<b>EOFPANJ Newsletter</b>
<b>Primary Objective</b>	To provide an ongoing communication vehicle among EOFPANJ, legislators, stakeholders, and membership
<b>Indicators of Success</b>	Quarterly newsletter distribution resulting in awareness of EOFPANJ, campus programs, and student success
<b>Metric</b>	10% increase in fiscal funding for EOF FY19



## Appendices

### Exhibit A: SWOT Analysis





## Appendices

### Exhibit B: Future Search Summary

#### *Summary of Steering Group Feedback*

Based upon the feedback attained from the group, it was discerned that the organizational constructs was somewhat misaligned -- basics of board management, programs, and parliamentary procedure. Political or personal aspirations of former board members arguably facilitated development of small intergroup enterprising under the auspices of the entity thereby posing a risk to the organization. The dialogue from this session not only placed the condition to develop an evaluation and/or leadership capacity tool for future consideration, but forged the urgency to address other areas of concern, such as organizational structure, succession planning, development of a code of ethics, operating policies and procedures (not the bylaws), fiscal protocols, and investment in parliamentarian procedure training. Also a nonprofit management assessment tool should be considered for future use to evaluate the BOD. Web-based tools to measure the effectiveness of the board, individual board members, and more can be downloaded from various websites such as the Council of Nonprofits or Bridgespan.

In addition to succession planning, the BOD may desire to consider development of a board recruitment process using a matrix to identify the knowledge and skillsets necessary for prospective new board members that can take the organization to the next level. For instance, the EOFPANJ could benefit by having people on the BOD who understand strategic planning, legal counsel (or a relationship with) and an accountant who can provide advice regarding organizational activities and its nonprofit status (advocacy, scholarship awards, and fundraising).



## Appendices

### Exhibit C: Summary of Stakeholder Opinion

#### *Summary of Membership Feedback*

EOFPANJ membership serves as the revenue base (member dues), coalition of advocates and volunteers who are benefactors of the organization and/or who can make a claim on its resources, and who directly (or indirectly) are affected by its impact (service outcomes). While the BOD steering group identified two issues of concern to be addressed for this population, it was through a focus group session and membership survey where we were able to extrapolate specific topics of concern. Key themes rising out of this segment included innovative professional development options, ability to address needs of students in light of diminishing fiscal resources, creation of regional colloquies to facilitate member engagement, bonding, and networking, elevating and preserving a brand identity in light of rising competition for resources, and professional credentialing of Directors for career progression.

#### *Summary of Stakeholder Feedback*

EOFPANJ provides a venue to engage in public policy and advocacy to advance an agenda in support of opportunity programs. As the competition for resources grow, it is imperative that the organization establish a strategy to advance an advocacy for action agenda. This agenda must include impact data that could assist the legislators in making informed decisions regarding allocation of resources and defending requests for support when engaged in annual public policy debates.

The EOF Central Office must be appropriately resourced to support statewide operations of all campus programming.