VISION

529 savings plans are the premiere choice for families to invest in a child’s future success.

MISSION

Empower Members to improve and expand utilization of 529 plans by providing an inclusive environment to network, train, and offer leadership opportunities; be the leading resource to advocate for and enhance 529 plans to become the primary saving mechanism for education, training, and skill development.

VALUES

Leadership: CSPN acts in a professional, ethical, and collaborative manner that earns and justifies trust in their actions and decisions.

Commitment: CSPN passionately advocates for and empowers families to save for education, training, and skill development.

Respect: CSPN respects and considers each other’s opinions perspectives.

Diversity and Inclusion: CSPN strives to increase diversity and inclusion among its membership and leadership.

Innovation: CSPN strives to identify, create, and enhance opportunities for families to save for a child’s future.
THE FUTURE: Ensure long-term sustainability and success of CSPN’s work

GOAL 1: Broaden representation among CSPN board members, committee chairs, conference presenters, and other positions of leadership or influence within the Network to reflect our plan users.

OBJECTIVE 1
Establish a Diversity and Inclusion standing committee to address diversity issues and institutionalize inclusion across the organization and its programs.

GOAL 2: Strengthen the organization’s operational ability to achieve goals.

OBJECTIVE 1
Revive dormant Operations Committee to address unrealized opportunities:
- Technology
- Data collection
- Information accessibility

GOAL 3: Strengthen the organization’s ability to remain focused on strategic priorities and achieve greater consensus to improve advocacy success.

OBJECTIVE 1
Expand role of a formal Governance Committee with responsibilities for accelerating key internal initiatives (along with providing new leadership opportunities):
- Executive Board eligibility
- CSPN officer rules and practices
- Committee leadership structure, roles and charters
- Nominations
- Diversity/inclusion
- Leadership and committee succession planning
- Communications
- Implementation and monitoring of strategic plan progress
- Consensus process
 OBJECTIVE 2
Systemize implementation of strategic plan.

 OBJECTIVE 3
Improve and institutionalize process to achieve member consensus on key issues.

GOAL 4: Proactively anticipate accelerated changes in higher education, including those from COVID-19, that impact the future appeal and use of 529 plans.

 OBJECTIVE 1
Gain expert opinions to enable organization to address savings impact in long-term planning. Subjects to include:
- Changing perceptions on value of higher education
- View of higher education in 18 years
- Enrollment trends
- Move to online learning
- Financial pressures

GOAL 5: Ensure adequate resources to pursue organization’s mission and vision.

 OBJECTIVE 1
Establish process for biennial review of financial structure.
ENGAGEMENT:

Raise the voices, engagement, and development of members to ensure the continued work and success of CSPN

GOAL 1: Ensure sustainability of committee leadership.

OBJECTIVE 1
Implement leadership development and succession planning for CSPN committee chairs.

GOAL 2: Provide opportunities for members to develop skills, knowledge, and relationships.

OBJECTIVE 1
Continue to enact strategies for enhancing CSPN member recruitment and engagement through 2022.

GOAL 3: Improve communications to members.

OBJECTIVE 1
Keep members better informed of organization and committee activities and progress.

OBJECTIVE 2
Explore adding part-time administration position to CSPN staff with focus on communications and reporting to members.

GOAL 4: Leverage senior leadership support to further encourage CSPN membership and involvement.

OBJECTIVE 1
Proactively gain and market endorsement of CSPN membership from State Treasurers and Executive Directors.
AWARENESS:

Lead the 529 industry in driving new 529 plan participation through increased national awareness on the value of saving for education, training, and skill development.

GOAL 1: Secure and maintain CSPN as “the” authoritative and objective source of info on 529 plans.

OBJECTIVE 1

Position and arm CSPN as the authoritative and objective source for the national media on 529 savings plans and program.

GOAL 2: Create awareness tactics for prospective and current account holders.

OBJECTIVE 1

Gain membership support for a collective awareness effort for generating understanding of 529 savings plans and leads generation.

GOAL 3: Establish CSPN as the go to source for members for communications, information, and data.

OBJECTIVE 1

Enable and encourage state plans to proactively convey a consistent and collective message.
GOAL 1: Maintain and improve access and appeal of 529 plans by advocating for favorable regulatory requirements during 2021-2024.

OBJECTIVE 1
Identify, develop, and prioritize new 529 plan savings opportunities in the federal tax code during 2021-2024.

GOAL 2: Enable state plans to understand and explore expansion opportunities.

OBJECTIVE 1
Identify, prioritize and communicate to members the new opportunities for expanding appeal and use of 529 plans, such as CSA, underserved populations, low-income matching scholarships, in-state tuition rewards.

GOAL 3: Achieve strong member engagement to improve outcomes in federal advocacy.

OBJECTIVE 1
Proactively enable State members to tell local stories on the need and benefits of 529 savings plans.
GOAL 4: Secure passage of *federal student financial aid calculations* treatment during 117th Congress.

**OBJECTIVE 1**

Improve possibility of legislation on treatment of 529 plan assets in federal student financial aid calculations during 117th Congress.

GOAL 5: Achieve new federal legislation enabling *employer tax incentives* for 529 savings plans.

**OBJECTIVE 1**

Develop position and proactive plan to *advance CSPN perspective* to add employer tax incentive legislation.