



## **Kansas Association of Student Financial Aid Administrators (KASFAA) Strategic Long Range Plan, 2018 to 2021**

**Adopted by the Board of Directors on April 4, 2018**

The Strategic Long Range Plan (SLRP) of KASFAA is intended to help guide the decision-making of the Board of Directors of KASFAA and to inform the membership of the priorities and activities of the Association. The goal of the SLRP is to ensure that KASFAA continues to serve its members and meet its objectives effectively over the three year period from April 2018 to March 2021.

The SLRP is informed by KASFAA's core values as well as its mission and vision, which are defined in our By-Laws and Policies & Procedures Manual. It uses these foundational materials to define priority areas for the Association. Each priority area has a number of goals that support our work in upholding our core values. Goals are further broken down into measurable strategies, actions, and tasks that will guide the work of the Association over the three year period of the SLRP. Various officers and committees are tasked with the work outlined in each strategy/action/task.

### **Strategic Long Range Plan Development Timeline**

In October 2017, the Association Governance committee reviewed the 2015-2018 SLRP to determine which goals from that plan were accomplished. For those goals that were not accomplished, the committee noted which ones may be appropriate to carry into a new SLRP and which were no longer needed for the work of the Association.

During the month of November, officers and committee chairs of the Board of Directors were tasked with reflection and consultation with their respective committees to discuss ideas for the SLRP and submit them to Association Governance. AG members then outlined a draft of goals for each priority area. Then, during KASFAA's 2018 winter board meeting in February, the full Board participated in a review of these suggested priority area goals and strategies to come to consensus on a working draft. Between February and April, final clean-up to the draft occurred.

A final draft was presented for adoption at the 2018 spring board meeting. Membership was informed at the 2018 spring business meeting of the approval of this new SLRP. The final document was also distributed to membership via the KASFAA listserv and was posted to the KASFAA website.

On a quarterly basis, starting in summer 2018, KASFAA's Association Governance committee will review the SLRP to ascertain to what extent the officers and committee chairs, acting on behalf of the membership, are achieving the goals established in the SLRP. Recommendations will be made as necessary to fully meet the goals by the end of the three year period. Further, as officers and committee chairs submit their reports to the Board of Directors on a quarterly basis, they will address their progress on SLRP goals which are assigned to them.

## **KASFAA's Core Values, as outlined in our Association By-Laws**

Friendships - To foster and promote standards of professional preparation, effectiveness, recognition, and association of student financial aid administrators and counselors at institutions of higher education and other public and private agencies/organizations concerned with or engaged in the support and/or administration of student financial aid.

People - To serve the needs and interests of students, faculties, and administrators of institutions of higher education, and public and private agencies/organizations administering student financial aid by promoting and facilitating the coordination of student financial aid programs.

Association Governance - To promote and facilitate communication among institutions of higher education and other public and private agencies/organizations.

Training - To stimulate, promote, and conduct training, research, cooperative experiments, education, conferences, and other related activities as are desirable or necessary in fulfilling the purposes of the Association.

## **KASFAA's Mission & Vision, as outlined in our Association Policies & Procedures Manual**

The Kansas Association of Student Financial Aid Administrators (KASFAA) is a nonprofit association of post-secondary institutions and agencies who are interested in promoting the effective administration of student financial aid in the State of Kansas. The Association has sought to ensure access to post-secondary education for the many students of this state through a variety of efforts in professional development, information dissemination, legislative and regulatory analysis. KASFAA believes that competent and well informed agencies and institutional financial aid administrators are vitally important if students are to receive the financial assistance to which they are entitled as they pursue post-secondary education.

KASFAA recognizes the need to form a strong alliance of professionals committed to the understanding of federal regulations, professional development and growth, and inform the public of the changes in the delivery of Title IV and State of Kansas funding. The Association is concerned with the application process, congressional methodology and fair and equitable treatment of all professional judgment decisions. We are reminded of our charge to provide resources and services to all students attending post-secondary education, recognizing that college costs are rising while state and federal funding levels remain constant or decline. The Association is committed to providing training to its members to ensure that financial aid is properly administered to all students.

Year 1 steps: Goal is to complete between April 2018 to March 2019

Year 2 steps: Goal is to complete between April 2019 and March 2020

Year 3 steps: Goal is to complete between April 2020 and March 2021

## Priority Area 1: Friendships, Volunteer & Leadership Development, and Networking

Goal 1: Diversify the volunteer pool and provide structured encouragement and training for volunteers.

Measure(s) of Success: Recruit the appropriate number of volunteers required to fill each committee each year, as outlined in the committee handbooks, and utilize all volunteers.

Each year, recruit at least one member new to volunteering for KASFAA for each particular committee.

| Steps/Strategies/Actions  | Responsibility                       | Year      | Progress |
|---|--------------------------------------|-----------|----------|
| In July of each year, personally follow up with each year's Summer Institute Scholarship winners to recruit them to volunteer for a committee.                                  | President                            | All Years | Done     |
| In May of each year, personally follow up with the new members recognized at the spring conference to recruit them to volunteer for a committee.                                | President                            | All Years | Done     |
| Modify the online Volunteer Form to ask those filling it out to indicate if they have volunteered with KASFAA before or not. If so, for which committees have they volunteered. | President                            | Year 1    | Done     |
| Develop a handout highlighting the benefits of KASFAA membership and volunteering, for individuals to share with campus leadership  | Membership                           | Year 1    | Done     |
| Create a robust Volunteer Guide which outlines tasks, roles, time commitments and benefits to volunteering.   | Association Gov.<br>Committee Chairs | Year 2    |          |
| Develop a Committee Chair Guide which would outline best practices across all committees on how to engage, utilize, and develop the committee's members.                        | President                            | Year 2    |          |

Goal 2: Create more defined channels for leadership development and provide support and training for those who do step into leadership roles.

Measure(s) of Success: Financially support leadership development initiatives, either from membership dues revenue or from reserve funds, each budget year.

Committee chairs and officers will report feeling more prepared to take on their roles.

| Steps/Strategies/Actions   | Responsibility              | Year   | Progress |
|--|-----------------------------|--------|----------|
| Devote the summer board meeting to more intentional leadership training for incoming committee chairs.   | President<br>Past President | Year 1 | Done     |
| Provide full financial support for the Treasurer-Elect to attend the NASFAA Leadership & Legislative Expo.   | Board of Directors          | Year 2 |          |
| Develop a leadership match program which would pair officers and committee chairs with new members to expose them to the structure, work and leadership of the organization. | Board of Directors          | Year 2 |          |

|   |                    |        |  |
|---|--------------------|--------|--|
| Develop a scholarship application program, similar to the RMAFSA Summer Institute scholarship program, which would provide partial financial support for 1 to 3 members to attend the NASFAA Leadership & Legislative Expo. | Board of Directors | Year 3 |  |
|---|--------------------|--------|--|

Goal 3: Welcome new members more intentionally and work to build stronger relationships and connections between all members.

Measure(s) of Success: When surveyed, new members will report feeling a greater sense of connection to KASFAA colleague at the end of each year.

| Steps/Strategies/Actions  | Responsibility   | Year                   | Progress               |
|---|--|------------------------|------------------------|
| Contact all first-time attendees for the annual conference by phone before the event to welcome them and invite them to the newcomers' reception.   | Membership<br>Conference<br>Planning                     | All Years              | Done                   |
| Conceptualize and formalize a mentoring program which would actively work each year to pair up members interested in being mentors with new members. Consider not always pairing "like with like" and cross-pairing between financial aid, fiscal officers and associate members. | Membership<br>Corporate Support<br>Fiscal Officers       | Year 1                 | In discussion          |
| Develop a communications plan that works to profile individual members and highlight their accomplishments on a monthly basis via the blog.   | Association News   | Year 1 then continuing | Was not done in Year 1 |
| Work with ATAC to better define an institutional member as being either in financial aid or being in the fiscal office. Actively recruit at least one fiscal officer from each member institution and personally invite fiscal officers to conference.                            | Electronic<br>Resources<br>Fiscal Officers<br>Membership | Year 2                 |                        |

Goal 4: Maintain accuracy in the membership database and evaluate membership renewal policies.

Measure(s) of Success: Active confirmation received each membership year from each institution's primary member that roster has been reviewed and cleaned.

| Steps/Strategies/Actions   | Responsibility                     | Year   | Progress  |
|--|------------------------------------|--------|---|
| Evaluate ways to move membership renewal process from requiring active renewal to passive renewal (i.e. auto renew and invoice institution.)               | Membership<br>Board of Directors   | Year 1 | Not possible with ATAC, will review with new provider |
| Update handbook to define a policy and procedure for dealing with expired, inactive, and duplicate member records on an annual basis.                      | Membership                         | Year 1 | Done  |
| Work with ATAC to provide functionality for members to upload a current photo into the membership directory to allow for easier recognition of colleagues. | Electronic Resources<br>Membership | Year 3 |   |

## Priority Area 2: Access, Advocacy and Outreach

Vital to the fulfillment of the KASFAA mission of ensuring access to post-secondary education are the efforts KASFAA initiates in the areas of legislative advocacy and partner outreach as we all work together to represent and serve the students of Kansas. To that end in 2018-2021, KASFAA will seek to accomplish the following three goals.

Goal 1: KASFAA will localize tools and events to expand participation in advocacy efforts at both the state and federal levels.

Measure(s) of Success: The presence of at least ten website resources focused on training KASFAA members how to advocate on legislative issues.

Successful implementation of a state-wide advocacy event with participation from at least 10% of the membership.

| Steps/Strategies/Actions   | Responsibility       | Year   | Progress   |
|--|----------------------|--------|--|
| Annually evaluate and enhance the Legislative website with tools and resources focused assisting with and explaining the advocacy process.           | Government Relations | Year 1 | Progress made but will wait for new website to implement |
| Create a KASFAA advocacy toolkit with instructions and customizable resources for members to duplicate and use during the "Storm the Capitol" event. | Government Relations | Year 2 |  |
| Develop an annual "Storm the Capitol" event focused on federal and state higher education issues to occur in April of each calendar year.            | Government Relations | Year 3 |  |

Goal 2: Explore ways to connect directly with high school counselors and students for the purpose of answering questions and assisting with the financial aid process.

Measure(s) of Success: A report with recommendations concerning cost in both money and volunteer time.

If implementation is feasible, create established goals for outreach with an implementation timeline.

| Steps/Strategies/Actions  | Responsibility                       | Year   | Progress                          |
|---|--------------------------------------|--------|-----------------------------------|
| Survey high school counselors to determine if they or their students would use an online resource to ask questions of financial aid administrators independent of college affiliation and best times for synchronous communication. | Outreach Training                    | Year 1 | Done, through training evaluation |
| Establish goals for exploration of online resources and volunteer time. Answer the question, what would direct connection with students through the KASFAA website look like?   | Board of Directors Outreach Training | Year 1 | Needs to continue                 |
| Explore and recommend online communication tools that can be hooked to the website and used to communicate synchronously or asynchronously with individuals visiting the website.   | Electronic Resources                 | Year 2 |                                   |

|  |   |        |  |
|--|---|--------|--|
| Explore and recommend best ways to advertise KASFAA services and mission to high school counselors and TRIO officers.    | Outreach Training                                 | Year 2 |  |
| Explore and recommend a suggested schedule for answering questions from students either synchronously or asynchronously. | Outreach Training                                 | Year 3 |  |
| Explore and recommend a communication plan to market and advertise the communication tool.                               | Association News & Publicity<br>Outreach Training | Year 3 |  |

Goal 3: KASFAA will monitor and encourage FAFSA completion for the state of Kansas leveraging technology to assist high school counselors in holding financial aid nights throughout the Fall and early Spring

Measure(s) of Success: FAFSA completion for students in the state of Kansas will increase by 20%.

| <b>Steps/Strategies/Actions</b>   | <b>Responsibility</b>                     | <b>Year</b> | <b>Progress</b>   |
|---|---|-------------|-------------------|
| Coordinate with high school counselors to see if KASFAA determined specified nights to be available online via live video chat sessions during the months of October and November to assist people in filling out the FAFSA, if they would use those nights to hold their FAFSA night sessions. | Outreach Training                         | Year 1      | Needs to continue |
| Explore and recommend online communication tools that can be hooked to the website and used to communicate synchronously with multiple users on specified nights during the months of October and November.   | Electronic Resources                      | Year 2      |                   |
| Coordinate with a television station in both the Wichita and Kansas City areas to produce an annual televised phone-a-thon using volunteers from the financial aid office during the month of February modeled after the Colorado FAFSA event.  | Outreach Training                         | Year 2      |                   |
| Using Facebook live, coordinate and implement an online KASFAA FAFSA event for Kansas Facebook users during the month of February.  | Outreach Training<br>Electronic Resources | Year 3      |                   |
| Explore and recommend a suggested schedule for staffing online, live chat sessions with multiple users on specified nights during the months of October and November.   | Outreach Training                         | Year 3      |                   |

### Priority Area 3: Association Governance

Goal 1: High quality record keeping, archiving and historical biography development

Measure of Success: Biography and History of KASFAA is developed and posted on KASFAA website.

Current paper documents are handled according to physical document storage policy and online storage policy.

Archive section of the KASFAA website is cleaned up and organized.

| Steps/Strategies/Actions   | Responsibility                       | Year   | Progress                      |
|--|--------------------------------------|--------|-------------------------------|
| Clearly define the roles of backup and archiving   | Archive<br>Board of Directors        | Year 1 | Done                          |
| Continue scanning of paper documents. Develop a retention policy that includes type of documents to be retained and time frame of retention            | Archive<br>Board of Directors        | Year 1 | Needs to continue into year 2 |
| With help from membership, develop biography and history of KASFAA. Review by laws and historical minutes. Create page on KASFAA website about KASFAA. | Association<br>Governance<br>Archive | Year 2 |                               |
| Review website contents as it pertains to archived documents. Develop physical document storage policy and online storage policy.                      | Archive<br>Electronic Resources      | Year 2 |                               |

Goal 2: Define roles of committees and committee chairs. Define transition from one year to the next for officers and committees

Measure of Success: Committee requirements and timelines are up to date and available for review on the KASFAA website.

Officer requirements are fully defined and handbooks posted on the KASFAA website.

Continuity from year to year between board of directors and committees is transparent and clear.

| Steps/Strategies/Actions   | Responsibility                                    | Year              | Progress                      |
|--|---|-------------------|-------------------------------|
| Determine needs and preferences related to Associate members. Develop sponsorship levels to support ongoing needs of KASFAA      | Corporate Support<br>Finance<br>Membership        | Year 1            | Reviewed but was not modified |
| Implement transition from Treasurer/Treasurer Elect/Finance Committee Chair. Update Bylaws, Policy and procedures and handbooks. | Treasurer<br>Finance<br>Association<br>Governance | Year 1            | Done                          |
| Update handbooks of all committees with current procedures. Ensure they are continuing to meet the needs of the organization.    | Association<br>Governance<br>Committee Chairs     | Ongoing each year | Done                          |
| Update and post officer handbooks  | Association<br>Governance                         | Ongoing each year | Done                          |

Goal 3: Website redesign – Review the association needs in a website.

Measure of success: A new and improved KASF AA website will be implemented (Note: Currently there is a website task force with a charter that was started in February 2017. This will continue in the current SLRP.)

| <b>Steps/Strategies/Actions</b>  | <b>Responsibility</b>   | <b>Year</b>   | <b>Progress</b> |
|--|---|---|-----------------|
| Review KASF AA website needs <ul style="list-style-type: none"> <li>a. Storage options and opportunities</li> <li>b. Vendor advertising/banners</li> <li>c. Archive options</li> <li>d. Appearance of the website</li> <li>e. Organization of the website</li> </ul> | Website Task Force<br>Electronic Resource<br>Archive<br>Corporate Support | In process and ongoing                              | Done            |
| Obtain options for website improvement either with new vendor or existing vendor. Present options to the Board of Directors  | Website Task Force  | Decided at Feb 2018 Board meeting to stay with ATAC | Done            |
| Work with vendor to design website functionality   | Website Task Force<br>Board of Directors                                  | Year 1  | Done            |
| Implement new and improved website   | Website Task Force  | Year 1  | Done            |
| Present to membership and provide training   | Electronic Resources  | Year 1  | Done            |
| Develop ongoing review of website and organization. Develop clean up and purging policy to move items that need to be current and archived   | Electronic Resources  | Year 2  |                 |



## Priority Area 4: Training and Professional Development

Goal 1: Provide site based training throughout the state to ease impacts on budgets making this available through one day sessions with the possibility of expanding into other areas through webinars.

Measure(s) of Success: A survey of those who attend the training will show that attendees found the training valuable, well-run, and a good investment for their time and money.

At least 50% of member institutions will send at least one participant.

| Steps/Strategies/Actions  | Responsibility               | Year   | Progress |
|---|------------------------------|--------|----------|
| Continue to develop site based training through the state using the NASFAA U as the base              | Drive-in Training Task force | Year 1 | Done     |
| Develop the Drive-in training task force into a full Professional Development Committee               |                              | Year 2 | Done     |
| Expansion of the site based training to expand into webinars that would not be as focused on NASFAA U |                              | Year 3 |          |

Goal 2: Utilization of our corporate partners to enhance and develop our trainings and the methods which they are delivered.

Measure(s) of Success: Current Associate Members will take advantage of the variety of options presented.

| Steps/Strategies/Actions   | Responsibility                     | Year   | Progress                      |
|--|------------------------------------|--------|-------------------------------|
| Create tiered sponsorship levels for associate members (explore new ways to differentiate sponsorship levels such as posting ads on the KASFAA website and/or through a conference app, opportunities for vendors to talk about their services during the conference, ability to sponsor stand-alone trainings etc.) | Corporate Support Associate Member | Year 1 | Reviewed but was not modified |
| Develop a policy for the P&P manual that goes along with the tiered support system for corporate development.  | Corporate Support Associate Member | Year 2 | May not be needed             |

Goal 3: Professional Development and Enhancement

Measure(s) of Success: KASFAA will be offering training opportunities for members in addition to the annual conference.

| Steps/Strategies/Actions  | Responsibility                               | Year   | Progress |
|---|--|--------|----------|
| Survey of the membership to find out what topics would be of interest that would not be financial aid related and more about being the day to day professional. | Professional Development Conference Planning | Year 3 |          |
| Engage members in professional development that goes beyond financial aid with topics based on survey results.  | Professional Development                     | Year 3 |          |
| Develop a strategy for offering regular trainings that can be provided in all delivery methods that are separate from the annual conference.                    | Professional Development                     | Year 3 |          |

## Priority Area 5: Fiscal Stability and Financial Health

Goal 1: Strengthen the financial integrity of the association by exploring opportunities for future financial growth.

Measure(s) of Success: Develop and implement policies related to investments, reserves, membership dues structure, and tiered sponsorship levels for associate members.

| Steps/Strategies/Actions  | Responsibility                             | Year   | Progress |
|---|--|--------|----------|
| Research investment strategies being used by other state and regional financial aid associations.   | Finance                                    | Year 1 | Done     |
| Research investment opportunities through local community foundations and investment groups. Review the current CDs so a comparison can be made on rate of return.    | Finance<br>Treasurer                       | Year 1 | Done     |
| Develop a proposal for investing reserve funds that will generate additional income for KASFAA.   | Finance<br>Treasurer                       | Year 1 | Done     |
| Review feedback from our membership and provide input regarding the expenditure of reserve funds.   | Finance<br>Treasurer<br>Board of Directors | Year 2 |          |
| Re-evaluate the current membership dues structure to ensure that we continue to provide valuable services for our membership, while maintaining a sustainable budget. | Membership<br>Finance<br>Treasurer         | Year 2 |          |
| Develop a proposal for handling the annual distribution of earned funds.  | Finance                                    | Year 3 |          |

Goal 2: Strengthen the financial integrity of the association by increasing transparency.

Measure(s) of Success: Create a transparent process for developing, monitoring, and reconciling the budget.

| Steps/Strategies/Actions   | Responsibility                                 | Year   | Progress |
|--|--|--------|----------|
| Review the Account list to determine appropriate categories for expenses and create a procedure to ensure consistency in posting items to QuickBooks.  | Finance<br>Treasurer                           | Year 1 | Done     |
| Determine appropriate reports to run in QuickBooks, frequency, and distribution of reports. (Provide reports to committee chairs to monitor ongoing expenses. Create a report to track the interest bearing accounts. Determine what reports should be posted online for membership to easily access.) | Treasurer<br>Finance<br>Association Governance | Year 1 | Done     |
| Modify the budget call process to give board members a transparent overview of all proposals so the board can make strategic decisions regarding priorities and the use of funds.  | Finance<br>Treasurer<br>Association Governance | Year 2 |          |
| Explore opportunities to leverage technology to make processes simpler and trackable (such as electronic signatures and online submission of reimbursement forms).   | Treasurer<br>Finance<br>Electronic Resources   | Year 2 |          |

Goal 3: Strengthen the financial integrity of the association by developing additional internal controls.

Measure(s) of Success: Demonstrate internal controls are effective by having regular audits that produce no significant findings.

| <b>Steps/Strategies/Actions</b>  | <b>Responsibility</b>                          | <b>Year</b> | <b>Progress</b>                 |
|--|--|-------------|---------------------------------|
| Fully implement online banking by closing out the Capital Federal bank account and moving all funds to Emprise bank.   | Treasurer                                      | Year 1      | done                            |
| Develop a procedure for downloading transactions from the bank into Quickbooks as well as reconciling the bank statements.   | Treasurer<br>Finance                           | Year 1      | May not accomplish b/c Emprise  |
| Modify the expense reimbursement form so that it can be used for credit card reconciliation and consider requiring approval from the applicable officer/committee chair for reimbursements.                              | Treasurer<br>Finance                           | Year 1      | Tabled for new website provider |
| Develop policies and procedures related to implementing the Treasurer succession plan (year one serve as Treasurer-Elect, year two serve as Treasurer, year three serve as Finance Chair). Update Handbooks accordingly. | Treasurer<br>Association Governance<br>Finance | Year 1      | Done                            |
| Review the process for conducting internal audits. More clearly define items that should be reviewed in an audit and frequency of review.  | Finance<br>Association Governance              | Year 2      |                                 |
| Develop a policy for handling cash payments.   | Finance  | Year 3      |                                 |