



## STRATEGIC LONG-RANGE PLAN 2015-2018

### KASFAA Mission & Vision

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.

### KASFAA Objectives & Strategic Steps (Approved Feb 29, 2016)

At the Spring 2016 board meeting in Manhattan, Kansas, the board and committee chairs were asked to submit goals for their committee through the 2018 year using the established and approved KASFAA objectives as a guide. The result is listed below.

- The Association will assist all members in the administration of financial aid funds management through training.
  - Organize the sub-committee timelines into a more user-friendly format implementing monthly and quarterly benchmarks and checkpoints to facilitate timely completion of tasks for successful conference planning. – **Conference Planning**
  - Create a committee handbook section for tips and tricks for involving the general membership as worker-bees, presenters and moderators. – **Conference Planning**
  - Create a committee handbook section with ideas and areas of concern to use for future conference sessions and trainings. – **Conference Planning**
- The purpose of the regular annual meetings of the membership will be to provide an ongoing dialogue among members, and a meaningful exchange of ideas.
  - KASFAA will create a flow chart of processes and timeline for the Awards committee (16-17) – **Awards**
  - KASFAA will create an electronic policy and procedures manual for the Awards committee (16-17) - **Awards**
  - KASFAA will propose a new award that will recognize the performance and achievements made from a KASFAA Newcomer/Rookie Award (17-18) – **Awards**
  - KASFAA will communicate with Treasurer and Membership and Welcome Committees to acknowledge new and old associate members – **Corporate Development/Associate Member Delegate.**

- KASFAA will seek to increase associate member support and presence in KASFAA targeting associate members who exhibit and/or participate in the regional association but not at KASFAA. – **Corporate Development/Associate Member**
  - KASFAA will utilize KASFAA-L more frequently to engage Fiscal Officers in online dialogue. – **Fiscal Officer**
- KASFAA will update members on Title IV regulations and other professional issues through various means of communication.
  - KASFAA will create a communication plan to regularly update the membership on matters of importance using existing committee and board resources. – **Association News**
- The Association will promote diversity awareness among its membership through the work of individual committees and conference sessions/speakers.
  - KASFAA will have at least one session or speaker on diversity at the Fall Training and annual Spring Conference – **Conference Planning**
- KASFAA will foster and promote networking and volunteerism among its membership.
  - KASFAA will evaluate and update the website for user friendliness and efficiency – **Electronic Resources**
  - KASFAA will Improve web presence for new members - **Welcome**
  - KASFAA will track correlation between members attending first conference and volunteering for a committee or board position - **Welcome**
  - KASFAA will create a user manual to facilitate transition between chairs that among other things specifically details what is expected in the way of a presentation to new members at the conference ‘meet & greet’ - **Welcome**
  - KASFAA will investigate data mining through the website-direct access to new member conference registrations and mentors/mentees - **Welcome**
  - KASFAA will collaborate with Association News chair to get member information for Welcome Committee contact - **Welcome**
  - KASFAA will explore a way to automate the receipt of a new member survey to new members as soon as their application is received, present new member survey – **Welcome**
  - KASFAA will develop a detailed list of responsibilities, procedures, flowchart and timeline for the Membership Committee – **Membership**
  - KASFAA will review feedback received to improve communication with members – **Membership**
  - KASFAA will create a written history of the organization – **Archive**
  - KASFAA will work towards more complete digital storage of its archived documents – **Archive**
- The Association will conduct Counselor training to aid counselors in understanding the financial aid process and any changes enacted through congressional action.
  - Implement and subsequently evaluate the Training Committee’s Action Plan for the limited/strategic onsite presentations, web-based format, and collaborative presentations (with various stakeholder organizations, such as Kansas Association of Counselors and MO-KAN-NE (TRIO/GEAR UP professionals). - **Training**
  - Develop a budget proposal for the Training Committee, including incorporating webinar software, if budget permits. - **Training**
  - Identify the primary initiatives (high school counselor trainings and KASFAA professional financial aid administrator trainings) of the Training Committee and designate appropriate subcommittees and/or seek necessary collaborations with other committees - **Training**
  - Develop a detailed policy and procedure manual with list of responsibilities, timelines, and collaborators for the Training Committee - **Training**
  - Outline relationships with FAFSA Completion Committee, KBOR, and Publications/Awareness Committee. - **Training**
  - Identify effective and reasonable timelines for the training schedule with Early FAFSA – **Training**
  - Identify specific objectives, goals, and benchmarks for the high school counselor trainings, i.e., target number of attendees/participants and learning outcomes achieved. – **Training**

- The Association will encourage its members to participate in all activities associated with financial aid awareness by participating in seminars, holding financial aid nights, making presentations and partnering with other professionals and organizations.
  - KASFAA will continue working with Kansas colleges to create/maintain financial aid events – **FAFSA Completion Initiative Task Force**
- The Association will promote financial aid awareness with the public as specifically designated by the Board of Directors.
  - KASFAA will continue to create a platform to reach Kansas families for FAFSA completion. – **FAFSA Completion Initiative Task Force**
  - KASFAA will monitor and provide communication for smooth implementation of Early FAFSA. – **FAFSA Completion Initiative Task Force**
  - KASFAA will Integrate a national FAFSA completion campaign into Kansas – **FAFSA Completion Initiative Task Force**
- The Association will review and respond to legislative proposals affecting the membership and address appropriate issue resolutions which affect the delivery of funds to students, or issues facing the Association.
  - KASFAA will formally thank state and federal figures for their work on behalf of students giving priority to state legislators and members of Congress. – **Government Relations**
- The Association will attempt to influence the formation of legislation and regulations to better serve the public and the financial aid community.
  - Each quarter, KASFAA will poll the membership for what state and federal issues are important to them and communicate these concerns to the KASFAA President-Elect prior to the NASFAA Leadership EXPO in Washington DC. – **Government Relations**
  - KASFAA will invite state and federal guest speakers to KASFAA meetings giving priority to state legislators and members of Congress. – **Government Relations**
- KASFAA will annually review the structure and duties of its officers, committees and meetings for relevance, effectiveness and efficiency.
  - KASFAA will review the purpose and duties of all committees and implement improvements that will assist the organization in leveraging resources, providing mission focus and encouraging expanded volunteerism. – **Association Governance**
  - KASFAA will examine officer duties for workload balance, clarity, checks and balances and implement improvements that will assist the organization in leveraging the resource of time, provide mission focus and encourage attention to leadership and expanded volunteerism. – **Association Governance**
  - KASFAA will explore the expansion of the executive board to include fiscal officer sector representation. – **Association Governance**
  - KASFAA will evaluate its governing documents for clarity of vision, purpose and tasks. – **Association Governance**
  - KASFAA will update the P&P moving procedural items to committee handbooks. – **Association Governance, All Committees**
  - KASFAA will review and strengthen its annual transitional board activities to support the transition of officers and committee chairs – **President**
- KASFAA will annually review its financial policies and structures to protect the future of the association and ensure fiscal health.
  - KASFAA will review and expand its financial policies to ensure compliance and transparency. – **Finance Committee**
  - KASFAA will review current procedures to ensure appropriate checks and balances are in place – **Finance Committee**
  - KASFAA will determine if more detailed procedures exist and, if applicable, create detailed step by step procedures for reconciliation. – **Finance Committee**

- KASFAA will determine if efficiencies can be established and any existing paper passing processes can be moved to an electronic format. – **Finance Committee**
- KASFAA will annually review, update and determine “Package Membership” for both associate member and associate non-member categories. – **Corporate Development/Associate Member Delegate**
- KASFAA will clarify and document the relationship between the Membership committee and the Treasurer – **Membership**
- KASFAA will explore the development of procedures to create an auto invoice and membership confirmation and update annually for the renewal of membership dues instead of having current members reapply each year. – **Membership**