



Kansas Association of Student Financial Aid Administrators (KASFAA) Strategic Long-Range Plan, 2021 to 2024

Approved by 2020-2021 Board of Directors, April 6, 2021

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 2021 to March 2024.

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 and 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

During the June 2020 board meeting, the Board of Directors reviewed the 2018-2021 SLRP to determine goals that had not been completed or were schedule to be completed in Year 3 (2021). July 2021 separate surveys were sent to the board and to membership to collect data to help drive where the next SLRP should focus resources. The board held a special meeting July 30, 2021 via Zoom to begin discussing ideas for the 2021-2024 SLRP where two main priority areas were identified. Additional brainstorming was done during the Fall board meeting, by Membership during their October and November committee meetings, and November board check-in call. In February, KASFAA President defined goals, and used brainstorming ideas as steps/strategies/actions. During the February check-in call, the board reviewed the information, made minor edits, and created Measures of Success for most goals. The KASFAA President continued working on the Measures of Success for the remaining goals.

KASFAA's Core Values, as outlined in 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 Mission of KASFAA is to assist college students in the State of Kansas with accessing the maximum available student financial aid possible through its commitment to training and professional development opportunities for the members of the Association.

The Vision of KASFAA is to be one of the most reliable and valuable resources for student financial aid support in the State of Kansas.

Year 1 steps: Goal is to complete between April 2021 and March 2022

Year 2 steps: Goal is to complete between April 2022 and March 2023

Year 3 steps: Goal is to complete between April 2023 and March 2024

Priority Area 1: Relationship Building

Goal 1: Encourage and enhance volunteerism within the membership.

Measures of Success: Each committee is fully staffed with volunteers.

Survey of volunteers indicates they felt informed of and utilized for committee work.

Steps/Strategies/Actions	Responsibility	Year	Progress
Provide a tool to directors for identifying volunteers in their office and ways for them to encourage their employees to get involved	Board of Directors Membership	Year 1 (2021-2022)	
Develop committee handbooks to provide more defined structure, refined goals, and systemization	Association Gov. Committee Chairs	Year 1 (2021-2022)	
Develop a one-pager to highlight benefits of volunteering, to supplement and introduce the robust Volunteer Guide	Corporate Support Membership Fiscal Officers	Year 2 (2022-2023)	
Explore option of recognizing institutions with the largest percentage of volunteers for each institution type	Board of Directors Membership	Year 3 (2023-2024)	
In February of each year, solicit volunteer testimonials from outgoing volunteers to be shared at conference and on the blog	Association News Conference Planning	Ongoing	
At end of each board year, evaluate and identify appropriate number of volunteers for each committee	Association Gov. Committee Chairs	Ongoing	

Goal 2: Increase engagement of membership

Measure of Success: Two percent increase in participation of members through participation from 2018-2019 benchmark. (i.e.-conference attendance, professional development training, moderating sessions, serving on committee)

Steps/Strategies/Actions	Responsibility	Year	Progress
Hold periodic contests with prizes on FB, Twitter, blog to increase membership followers	Association News	Year 1 (2021-2022)	
Create and distribute a one-pager for Fiscal Officers to express what KASFAA offers for them	Fiscal Officers	Year 1 (2021-2022)	
Develop photo archive on KASFAA website of trainings, conferences, etc. listing names, dates, and event	Archive Electronic Resources	Year 2 (2022-2023)	
Explore new ways for connecting members outside of the conference setting	Board of Directors	Year 3 (2023-2024)	
Hold KASFAA sponsored quarterly meetings to discuss issues affecting Fiscal Officers	Electronic Resources Fiscal Officers	Ongoing	
Hold KASFAA sponsored quarterly meetings by institution type and combined institution types to discuss current financial aid trends or legislation	Electronic Resources Professional Development	Ongoing	

Goal 3: Develop relationships at Spring Conference

Measure of Success: Through annual conference evaluation look for one percent increase in reported number of new relationships each attendee developed.

Steps/Strategies/Actions	Responsibility	Year	Progress
Host a networking breakfast for Directors, Controllers, and Exhibitors	Conference Planning Corporate Support Fiscal Officers	Year 1 (2021-2022)	
Assist attendees to pair up with length of service opposite of each person (i.e. – someone with less than 1-year experience finds someone with more than 20-years experience)	Conference Planning Membership	Year 2 (2022-2023)	
Use color coded name tags and each meal have assigned tables to mix up who attendees are sitting with	Conference Planning Corporate Support Membership	Year 3 (2023-2024)	
Assist directors in identifying and introducing their employees to others who do a similar job at other institutions	Conference Planning Membership	Ongoing	
Hold intentional daytime team building events during conference to build relationships	Conference Planning Corporate Support	Ongoing	

Goal 4: Provide opportunity for mentorship

Measure of Success: For mentorship programs, level of satisfaction in the program.

For relationship programs and developing candidates for future officer positions, have a positive number of participants and have full slate of candidates.

Steps/Strategies/Actions	Responsibility	Year	Progress
Evaluate and continue mentorship program developed during 2018-2021 SLRP cycle for first year members	Membership	Year 1 (2021-2022)	
Explore developing a mentorship program for new fiscal officers	Fiscal Officers Membership	Year 1 (2021-2022)	
Explore relationship opportunities for different levels based upon years of experience or job expertise	Membership	Year 2 (2022-2023)	
Create a leadership match program for Associate Members to develop Associate Member Rep candidates	Associate Member Rep Corporate Support Membership	Year 2 (2022-2023)	
Develop a program to match aspiring directors with current directors as a resource for professional development	Membership Professional Development	Year 3 (2023-2024)	
In February of each year, solicit mentor/mentee testimonials from outgoing mentors/mentees to be shared at conference and on the blog	Association News Conference Planning Membership	Ongoing	
Assist members/institutions in keeping their profiles and roster up to date and using the directory to find experts in the topic member needs assistance with (i.e.- R2T4, loans, etc)	Associate Member Rep Electronic Resources Membership	Ongoing	
Work with directors to identify quality candidates for future committee chair or officer positions and work to mentor for those positions in the long term	Board of Directors	Ongoing	

Priority Area 2: Training

Goal 1: Continue to provide quality training to high school counselors and other partners so they can provide FAFSA Completion Support for their students.

Measure of Success: Evaluation data from training sessions indicates high satisfaction of attendees.

Steps/Strategies/Actions	Responsibility	Year	Progress
Evaluate effectiveness of multi-session virtual trainings held in 2020-2021 and determine if they should continue to be held virtually, move to in-person, or offered as a hybrid option and which is most cost effective for counselors and KASFAA	Finance Outreach Training	Year 1 (2021-2022)	
Create a tip sheet for KASFAA schools on offering FAFSA Completion events for their area high schools either virtually, hybrid, or in person; in support of FAFSA Completion Competition for KSHSAA schools sponsored by KBOR and KDSE	Outreach Training KBOR	Year 1 (2021-2022)	
Provide additional training and resources regarding the changes with FAFSA Simplification	Outreach Training	Year 2 (2022-2023)	
Develop a database of high school counselor contacts and a plan for keeping it up to date	Electronic Resources Outreach Training	Year 3 (2023-2024)	
Identify and implement new session topics as relevant based upon consumer demand or new legislation	Outreach Training	Ongoing	

Goal 2: Increase membership utilization of kasfaa.org as the resource it's intended to be.

Measure of Success: Ninety percent of members have updated their member profile for expertise and uploaded a photo of themselves.

Survey of membership indicates that fifty percent of members are using the website for networking and to identify training opportunities.

Steps/Strategies/Actions	Responsibility	Year	Progress
Provide simple instruction of how to update member profile and utilize Member Center	Electronic Resources	Year 1 (2021-2022)	
Develop & implement instruction for committee chairs on how to use Project/Committee area	Electronic Resources President Trio	Year 1 (2021-2022)	
Develop instruction for committee members on using Project/Committee area and finding other relevant information (i.e.-Archive, Membership, and Conference Planning would all have different areas relevant to them)	Committee Chairs Electronic Resources President-Elect	Year 2 (2022-2023)	
Create a blog series featuring different areas of the website	Association News Electronic Resources	Year 2 (2022-2023)	
Offer informational "What the KASFAA Website Can Do For You" session	Conference Planning Electronic Resources Professional Development	Year 3 (2023-2024)	
Keep calendar up to date with training opportunities	Associate Member Rep Corporate Support Electronic Resources Outreach Training Professional Development	Ongoing	

Goal 3: Continue to provide effective training for membership

Measure of Success: Survey of attendees at each training session indicates an average score of 4 or higher on a 5-point scale in regards to satisfaction with training, and ability to use information to perform their job duties.

Steps/Strategies/Actions	Responsibility	Year	Progress
Evaluate preference of training on financial aid only topics, professional development only, or a combination of both	Professional Development	Year 1 (2021-2022)	
Determine which delivery method is preferred and most cost effective for schools and KASFAA; in-person, hybrid, or virtual	Conference Planning Professional Development	Year 1 (2021-2022)	
Investigate options of partnering with NASFAA, KBOR, KICA, ED to offer quarterly updates, or updates during/after legislative sessions	Professional Development	Year 2 (2022-2023)	
Partner with Associate Members to provide professional development sessions specifically for the membership	Professional Development	Year 3 (2023-2024)	
Provide topic relevant sessions/events for Fiscal Officers and heavily market these events	Conference Planning Professional Development	Ongoing	

Goal 4: Maintain fiscal stability while providing training, networking, and professional development opportunities to the membership

Measure of Success: It remains financially feasible for KASFAA to provide scholarships for at least 4 members to attend Summer Institute, at least one member (in addition to President-Elect and Treasurer-Elect) to attend NASFAA Leadership and Legislative Conference, and at least one member to recertify their Certified Financial Aid Administrator status each year, while maintaining a standard operating budget for existing expenses.

Steps/Strategies/Actions	Responsibility	Year	Progress
Implement scholarship program to provide partial financial support for 1-3 members to attend the NASFAA Leadership & Legislative Expo	President Treasurer	Year 1 (2021-2022)	
Develop and implement a scholarship program to provide financial support for 1-3 members to recertify their Certified Financial Aid Administrator status	Association Governance Finance	Year 1 (2021-2022)	
Conduct cost-benefit analysis to evaluate KASFAA offerings to the membership and determine if dues need to be increased to meet goals	Board of Directors Finance	Year 2 (2022-2023)	
Investigate opportunities to apply for grants to supplement funding for training and professional development; evaluate if grant writer needs to be hired	Finance Conference Planning Outreach Training Professional Development	Year 2 (2022-2023)	
Implement dues increase, if determined necessary during Year 2 cost-benefit analysis	Membership Treasurer-Elect Treasurer	Year 3 (2023-2024)	