



# **Pennsylvania Association of Student Financial Aid Administrators**

## **PASFAA Strategic Plan 2016-2020**

**Approved by PASFAA Council  
2/22/2016**

### **PASFAA MISSION STATEMENT**

The Pennsylvania Association of Student Financial Aid Administrators (PASFAA) is a dynamic service association whose mission is to provide training, mentoring, and career support to members and other constituencies within a changing environment; to advocate for access to post-secondary education; and to educate the public on financial aid opportunities.

# **PASFAA STRATEGIC PLAN: GOALS, OBJECTIVES, STRATEGIES**

## **Governance, Bylaws Membership, and Technology**

### **GOAL 1: Provide the Foundation for an Efficient and Effective Association**

**Objective A:** Provide for proper and consistent Association governance.

- Assure that the strategic plan is annually reviewed, followed and disseminated to members.
- Ensure that Association policies and procedures, Constitution and Bylaws are reviewed annually by the Membership and Governance committee
- Review all executive council position descriptions annually.

**Objective B:** Evaluate and be aware of the composition of PASFAA membership for continued Association effectiveness.

- All committees will explore the issues related to the diversity of our membership (i.e., ethnicity, gender, age, sector, etc.) to determine if new initiatives are needed to support and improve diversity.
- Identify which membership demographic items are important for decision making and collect these via the membership application. Membership and Association Governance Committee will analyze and report to Council annually.

**Objective C:** Promote membership.

- Identify sources and types of potential membership.
- Communicate and enhance the value of membership.
- Utilize Sector Representatives to recruit and welcome new members by disseminating PASFAA New Member Information. (See also: Goal 3 Objective A)

**Objective D:** Utilize current technology.

- The Technology Advisory and Electronic Initiatives Committee will evaluate the latest technology and make recommendations to Council on how to best serve the organizational goals and objectives.

## **Association Finances**

### **GOAL 2: Maintain Fiscal Strength, Integrity, Transparency and Responsibility in Association Endeavors**

Objective A: Maintain a reserve at least two times the average approved Association budget of the previous three years.

- Monitor the amount of funds in the contingency reserve.
- Ensure that the Finance and Development Committee review the investment strategy for the contingency reserve annually and recommend to Council any reallocations among the accounts.
- Communicate the financial information to the membership at least annually.

Objective B: Ensure that adequate checks and balances are in place within the Association.

- Provide training to all who expend PASFAA resources including committee chairs and council members. (Topics shall include the strategic plan, fiscal policies, procedures and individual committee budgets.)
- Treasurer in consort with Finance and Development Committee monitors and reports the expenditures to Executive Council throughout the year.
- Finance and Development Committee prepares and recommends the annual budget for Executive Council approval.

Objective C: Be fiscally responsible with the financial resources of the Association in accordance with the stated goals, objectives, and budgetary allocations.

- Conduct a quarterly review of the annual budget.
- Conduct an analysis of expenditures related to Association activities.
- Exercise reasonable economy with Association resources.

## **Communication**

### **GOAL 3: Strengthen the Communication and Awareness of the Association**

Objective A: Use available resources to disseminate information to the membership.

- Continually review the PASFAA website for content, web page usage, ease-of-use and implement improvements.
- Require committees to communicate the Association's goals, objectives, and activities through available resources.
- Utilize the Communications and Technology Advisory and Electronic Initiatives committee as a resource for improving the dissemination of information to members.
- Develop and annually update PASFAA New Member Information and disseminate to appropriate parties. (See also: Goal 1 Objective C)

## **Professional Development, Leadership and Volunteerism**

### **GOAL 4: Provide Opportunities for the Professional Development of All Association Members**

Objective A: Provide programs of vitality and relevance for members and constituents.

- Assess current professional development programs to assure they are meeting current and future needs.
- Evaluate the effectiveness of professional development activities relative to membership size, location, calendar, content, and cost.
- Continually investigate joint professional development opportunities with appropriate entities.
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Objective B: Provide opportunities for involvement by members.

- Evaluate the effectiveness of the volunteer process.
- Create ways to encourage members to serve the Association.
- Annually provide training/instruction to committee chairs on accessing volunteer lists.

Objective C: Provide activities that develop leadership skills within the membership.

- Offer and improve the leadership development workshop.
- Identify potential leaders and provide a conduit to their continued participation and involvement.
- Continue to strengthen and develop activities that foster mentorship.

## **Legislative Advocacy**

### **GOAL 5: Advocate for Post-Secondary Education Funding and Concerns**

Objective A: Educate and inform members, legislators, and other external constituents on issues related to post-secondary education funding and concerns.

- Offer training opportunities and information.
- Enhance the PASFAA website to include resources and links for members to promote advocacy.
- Enhance the Government Relations Resource Center on the PASFAA website to include relevant information for legislators and other constituents.

Objective B: Collaborate with peer associations, legislators, and related agencies.

- Enhance relationships with other higher education associations in support of advocacy.
- Provide information and resources to legislators and related agencies.

Objective C: Support advocacy to students and parents.

- Provide financial aid advocacy resources to support communications with legislators and related agencies through post-secondary institutions and secondary school avenues.

## **GOAL 6: Promote Outreach for Post-Secondary Education and Funding**

Objective A: Examine current programs and investigate future outreach opportunities.

- Create awareness of PASFAA's participation in outreach activities.
- Explore new partnerships related to outreach activities.

Objective B: Increase awareness of financial aid opportunities among students, parents, counselors and community members.

- Review and improve all pertinent sections of the PASFAA website.
- Identify communities or geographic areas within the Commonwealth that have a need for increased financial aid awareness activities, and inform them of Association resources.
- Continue to work with other partners to increase financial aid awareness activities in high-need areas within the Commonwealth, as needed.

## **PASFAA STRATEGIC PLAN: History, Development and Implementation**

PASFAA determined the need to create a five-year strategic plan as a result of discussions from the December 2004 PASFAA Retreat. This Plan is to provide the framework for the development and growth of the Association from 2006-2011. The Committee discussed and solidified the concerns, needs, and suggestions of the Association into six major goals. Each goal was then paired with objectives and strategies to further define the goal and provide a blueprint for implementing each goal.

In 2011, PASFAA Council created the Ad Hoc Strategic Planning Committee and charged this committee with the redevelopment of the Plan. In order to seek membership input, the committee charged the Sector Representatives to contact their constituents with the draft plan to assist the Planning Committee with identifying the members' key issues and concerns. The comments collected along with PASFAA's Mission Statement were used as the basis for the redevelopment of the Strategic Plan.

In December 2015, a second Ad Hoc Strategic Planning Committee was created to review and update the Plan.

This five-year plan is a living document. It is the responsibility of PASFAA Council to ensure that the strategies and objectives are pursued in an effort to achieve the identified goals. Where indicated, specific PASFAA committees are responsible for implementing strategies to meet identified objectives.

Like any volunteer organization, the Association is only as strong as its membership. Using this Plan, PASFAA leadership can provide a strong framework for more involvement, communication and professionalism for those involved in providing financial assistance to students and families in the Commonwealth.

### **PASFAA STRATEGIC PLANNING COMMITTEE – 2015**

Joseph Alaimo, Chairperson  
Stacy Schenk  
Carolyn Julian  
Tonya Hsiung  
Mary Miller  
Alyssa Dobson  
Randall McCready  
Kelly Liocano  
Colleen Coudriet

## **PASFAA COUNCIL 2015-16**

President: Stacy Schenk  
President-Elect: Carolyn Julian  
Past President: Joseph Alaimo  
Vice President: Alyssa Dobson  
Secretary: Meghan Petsko  
Treasurer: Tonya Hsiung

Sector Representatives:  
Business, Trade & Technical: Amy Dullinger  
Graduate: David Eber  
Institutional Support Services: Ben Brudnock  
Nursing: Linda Ebel  
Private: Robyn Barto  
Public Two-Year: Kyle Mosley  
PASSHE: Tory Weigant  
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