

## PATF Strategic Plan Dashboard (FY 2020 – 2023)

Goal/ Program/Activity	Progress
<b>Program: Be the preferred agency for people with disabilities and older Pennsylvanians for financing assistive technology devices and services.</b>	
Evaluate the loan application process and applicant pool for mini-loans and low-interest loans.	
Increase Mini-Loan activity.	
Expand the partial grant (“Mini-Grant”) program.	
Review and Expand Relationships with Lenders/Funding Partners.	
Increase the low-interest loan activity.	
Provide Information & Assistance (I & A) on possible AT funding resources.	
Update and disseminate the AT Funding Resources book, as needed.	
Provide information on accessing AT from home and community-based waiver programs, including Community HealthChoices.	
Organize and lead an annual conference for PATF partners to share information about AT funding resources, financing opportunities or other related programs.	
Solicit stakeholder input for PATF branding and marketing design.	

Develop PATF brand guidelines that will be used for creating marketing and outreach materials.	Green
Continue to implement marketing and outreach strategies that engage Pennsylvanians with PATF's programs.	Green
Maintain and update PATF's informative and fully accessible website.	Green
Maintain and expand PATF's presence on social network platforms.	Green
Create and disseminate an electronic newsletter.	Green
Submit articles about PATF's programs for inclusion in other organizations' newsletters and outreach activities.	Green
Build relationships with reporters and news outlets that will write and disseminate PATF's information.	Blue
Create and disseminate program brochures and other outreach material that is accessible and easy-to-read and understand.	Green
Conduct an annual press event in Harrisburg to share borrower stories and highlight PATF's programs and accomplishments.	Blue
Support the Funding Assistance Coordinator (FAC) network and expand outreach efforts throughout PA.	Green
Expand outreach to new market areas, including managed care (healthcare) organizations and provider agencies.	Green
Update <i>Cents and Sensibility</i> with revised editions to include information about housing, insurance, the differences between Special Needs Trusts and ABLE accounts.	Red

Green: Active

Blue: Emerging, some activity

Red: No activity at this time

Expand financial education opportunities for people with disabilities.	Green
Explore the development and marketing of a financial education certificate program using Cents and Sensibility: A Guide to Money Management	Blue
Prepare a business plan for funding PATF's financial education programs.	Red
Advocate for policies and programs that empower individuals with disabilities to be included in the planning for his/her financial future.	Green
Evaluate the possibility of PATF becoming a technical assistance resource for AT loan programs that want to develop programs that serve people with disabilities.	Blue
Evaluate the possibility of expanding loan activity into other states.	Red
<b>Infrastructure: PATF has the Supports and Infrastructure in Place to Effectively and Efficiently to Carry Out Its Mission.</b>	
Maintain and update the Board of Directors' grid.	Red
Develop, complete and analyze a Board self-assessment. Implement new practices and policies, as needed.	Blue
Recruit individuals for Directors of the Board, recognizing the needs of the organization.	Red
Review and update the Board Responsibilities and Guidelines policy as well as Committee responsibilities.	Red

Expand Board education programming, including on-boarding and continuing education opportunities.	Green
Develop policies to establish term limits and succession plans for Board directors, including officers.	Red
Review committee structure, update committee descriptions, roles and responsibilities.	Red
Review and revise, as needed the By-Laws to reflect Board member succession, standing committees, roles and responsibilities of committees and other sections, as needed.	Red
Explore adding a Government Relations Committee of the Board.	Red
Evaluate the effectiveness of Board meetings and make changes, when necessary.	Blue
Monitor Strategic Plan implementation.	Green
Continue to create and provide training opportunities, including peer mentoring, conference sessions, e-learning for staff.	Green
Review and update personnel policies and the employee manual.	Red
Review and update operational and procedural manuals.	Green
Review and revise staff descriptions to align with job responsibilities, duties and activities.	Blue
Review staff members' job descriptions with performance for the annual review.	Green
Revise and apply job performance tool for all staff.	Green

Review staff compensation packages and compare with similar regional non-profit organizations; and, adjust as needed.	Red
Evaluate and revise facility needs for PATF programming.	Blue
Review and address equipment and technology needs for PATF programs and services.	Green
Update the “emergency” succession plan.	Blue
Create a “scheduled” succession plan.	Red
Implement the scheduled success plan.	Red
Establish a process for new CEO on-boarding.	Red
<b>Development/Fundraising: PATF Will Be a Financially Sustainable Organization.</b>	
Complete a comprehensive fundraising plan for organizational sustainability.	Blue
Evaluate the development of a corporate donor program.	Blue
Maintain certification as a state and federal CDFI.	Green
Advocate for federal funding opportunities for CDFI funding, including Disability Funds, as well as the Alternative Financing Programs (AFPs), Assistive Technology Act.	Green
Expand fundraising efforts with local, regional and national private foundations that will support PATF’s mission with general operating grants or project grants.	Green

Expand individual donor campaign for increased participation.	Blue
Expand on-line giving opportunities.	Green
Meet with policymakers to discuss PATF's mission and programs.	Green
Review the Investment Policy and modify, as needed.	Red
Explore options for increased interest and dividends in the investment account.	Blue
PATF staff will complete a time study and functional assessment analysis.	Red
PATF's books will be audited by an independent auditor and the findings will be available upon request.	Green
The Finance Committee will review, evaluate and implement recommendations in the Management Letter.	Green

December 2020