



National Association of Presidential Assistants in Higher Education

Annual Business Meeting

Friday, March 13, 2026
8:30 AM Central Standard Time
Marriott Rivercenter on the Riverwalk
San Antonio, Texas



The History of NAPAHE

The idea for gathering a few presidential assistants started with one PA, Pamela Transue, from the University of Washington, who began her outreach in 1987 to 24 other presidential assistants all around the country to find out if they had anything in common. Two years later, after several phone calls and conversations, the momentum began to build. Everyone she talked to was delighted to discover others who had many of the same satisfactions and difficulties with their positions as assistants to presidents or chancellors.

In the course of those conversations, considerable enthusiasm was expressed for the notion that they gather, perhaps in connection with a meeting of a national higher education association. A steering committee of five was formed – known as the “Gang of Five” who laid the foundation for the Association’s first annual meeting.

The Presidential Assistants in Higher Education (PAHE) first met in 1988 to discuss and address mutual concerns, common problems, and issues of immediate and long-term professional interest. The experience of the first two meetings of PAHE, under the auspices of the American Council on Education, clearly demonstrated the need for continuing the organization. The goals of NAPAHE today are similar to what they were in 1988.

In 1989, at the request of the Steering Committee for Presidential Assistants in Higher Education, the University of Pittsburgh, undertook a major national study of incumbent assistants to the president and/or chancellor. A survey was sent to 650 institutions, which yielded 414 usable responses.

Significant milestones followed with the adoption of Bylaws and Constitution in 1993, and later the application for tax-exempt status formalizing the status of the National Association of Presidential Assistants in Higher Education. NAPAHE then formalized its association with the American Council on Education. The membership had a voice in electing the Board and its officers. With the adoption of the constitution and bylaws, NAPAHE moved into a new era of existence. However, at the same time it attempted to maintain the informal collegiality that it had characterized in earlier years. NAPAHE was a relative newcomer within the higher education community.

The number of PAs attending the annual meeting grew steadily over the years. For example, in 1993 the number in attendance was approximately 70 – today it is over 300.

For a comprehensive understanding of the many dimensions of presidential assistants, and practical advice about several key features of the role, a book titled, *Other Duties as Assigned*, published in 2009 and edited by Mark P. Curchack, who retired from Arcadia University, is available through a number of online sources.

NAPAHE

Professionals Supporting Higher Education Leaders

<u>Year</u>	<u>Board Chair</u>	<u>Institution</u>	
2025	Rolanda Burney	Emory College of Arts and Sciences	
2024	Michael Sass	University of Health Sciences and Pharmacy in St. Louis	
2023	Michael Johnson	University of Houston	
2022	Diane Fornieri	Molloy University	
2021	Don-Terry Veal	Morgan State University	
2020	Kai Swanson	Augustana College	
2019	Barbara Sandoval	Western Washington University	
2018	Kathryn Enke	College of Saint Benedict	
2017	Kim Durr	Southern Illinois University Edwardsville	
2016	Heather Fehn	The College of New Jersey	
2015	Monica Huffman	University of Central Missouri	
2014	Sydney Peterson	Utah State University	
2013	Phyllis Gregg	DePaul University	
2012	Max Allen	University of North Carolina-Wilmington	
2011	Blake Fry	University of Wisconsin-River Falls	Lifetime Member
2010	Kim Luse	Northern Kentucky University	
2009	Linda Ryan	Drake University	Lifetime Member
2008	Linda Ryan	Drake University	Lifetime Member
2007	Beth Brooks	The Colorado College	
2006	Cindy Baden	Hocking College	
2005	Mike McGreevey	Ithaca College	
2004	Emily Sinsabaugh	Edinboro University of Pennsylvania	
2003	Jeff Johnson	University of Puget Sound	
2002	James Dixon	University of North Carolina-Charlotte	
2001	Felita Williams	Georgia Perimeter College	
2000	Elizabeth ("Buff") Schoenfeld	Western Washington University	
1999	Pam Parsons	Bridgewater State College	
1998	Sylvia Payne	Indiana University-Purdue University	Lifetime Member
1997	Anthony Ross	Wichita State University	
1996	Mark Curchack	Beaver College	Lifetime Member
1995	Mark Curchack	Beaver College	Lifetime Member
1994	Roland Smith	University of Notre Dame	
1993	Mary Ann Shallberg	University of Houston-Clear Lake	
1992	Sam Baker	Southern College of Technology	
1991	Jane Buie	Loyola University	NAPAHE Board of Directors PAHE Steering Committee
1990	James Scally	University of Kansas	PAHE Steering Committee
1989	James Scally	University of Kansas	PAHE Steering Committee
1988	Pamela Transue	The University of Washington	PAHE Steering Committee
1987	Pamela Transue	The University of Washington	PAHE Steering Committee



Board of Directors

2025-2026

Executive Committee

Board Chair

Rolanda Burney

Chief Administrative Officer to the Dean of the College of Arts and Sciences
Emory University

Board Chair-Elect

Lynette Arner

Executive Administrative Assistant to the Office of the CEO
The James Cancer Hospital
The Ohio State University

Board Secretary

Chair, Conference Planning Committee

Rowena Clukey

Executive Director of the Chancellor's Office
University of Maine System

Board Treasurer

Chair, Sponsorship Committee

Sheri Sargent

Chief of Staff & VP for Administrative Services
Minnesota State University, Mankato

Immediate Past Board Chair

Vice-Chair, Sponsorship Committee

Michael Sass

Chief of Staff
University of Health Sciences & Pharmacy in St. Louis

Executive Director (ex officio)

Stuart Schmidt

NAPAHE



Directors

Listed Alphabetically by Last Name

Board Member

Vice-Chair, Professional Development Committee

Mia Casey

President's Executive Assistant and Director for
Presidential Initiatives and Events

Baylor University

Board Member

Chair, Nominating Committee

Joanna Carey Cleveland

Vice President and General Counsel, Chief of Staff,
and Secretary to the Board of Trustees

University of Puget Sound

Board Member

Edward Cullinane

Director, Governance & Presidential Engagement

Babson College

Board Member

Heather Fehn

Vice President & Chief of Staff,

Secretary to the Board

The College of New Jersey

Board Member

Vice-Chair, Conference Planning Committee

Stephanie Horner

Assistant to the Dean for the School of Business

The College of New Jersey

Board Member

Chair, Professional Development Committee

Tykesha Myrick

Chief of Staff

Northern Virginia Community College

Board Member

Chair, Communications Committee

Brynne Pulver

Executive Assistant to the Vice Chancellor

Enrollment Management

University of North Carolina at Greensboro

Honorary Board Member

Marc Schaeffer

Retired, Chief of Staff to the President and Board of
Trustees

William Paterson University

Board Member

Chair, Membership Committee

Jana Seutter

Senior Assistant, Office of the President

St. Ambrose University

Board Member

Vice-Chair, Membership Committee

Crystal Wilson

Administrative Director, Office of the President

Teachers College, Columbia University

Updated February 16, 2026



NAPAHE's 39th Annual Business Meeting
National Association of Presidential Assistants in Higher Education (NAPAHE)
Friday, March 13, 2026 at 8:30 AM CDT to 9:00 AM CDT
San Antonio Marriott Rivercenter on the Riverwalk

Agenda

I. Call to Order & Welcome

Presenter: Rolanda Burney

II. Approval of the Minutes from January 25, 2025

Presenter: Rolanda Burney

III. Annual Business

Presenter: Rolanda Burney

- A. Election of New Board Members**
- B. Re-Election of Second-Term Board Members**
- C. Election of 2026-2027 Board Officers**
- D. NAPAHE Bylaw Amendments**

IV. Board Chair's Report

Presenter: Rolanda Burney

V. Treasurer's Report

Presenter: Sheri Sargent

VI. NAPAHE's Strategic Roadmap to 2028

Presenter: Stuart Schmidt

VII. Announcing NAPAHE's 40th Annual National Conference

Presenter: Stuart Schmidt

VIII. Passing of the Gavel and Remarks

Presenters: Rolanda Burney, Lynette Arner

IX. New Business

Presenter: Lynette Arner

X. Announcements

Presenter: Lynette Arner

XI. Adjournment

Presenter: Lynette Arner

NAPAHE
Annual Business Meeting Minutes
January 25, 2025
8:15 a.m. EST
Marriott Marquis Washington, DC

Members Present:

Michael Sass (Chair), Rolanda Burney (Chair-Elect), Joanna Carey-Cleveland, Rowena Clukey, Edward Cullinane, Heather Fehn, Tracy Labadie, Asma Raouf, and Sheri Sargent

Executive Director: Stuart Schmidt

Members Absent: Michael Johnson (Immediate Past-Chair), Lynette Arner (Treasurer), Melissa A. Maszczak (Secretary), Tykesha Myrick, Steve Frieder, Jana Seutter, Marc Schaeffer (Honorary), and Don-Terry Veal

I. Call to Order

Chair Sass called the meeting to order at 8:15 a.m. EST.

- Chair Sass pointed out the history of NAPAHE, Board Chair and Board of Director History and committee reports provided in the materials.

II. Approval of January 20, 2024 Minutes

Presenter: Michael Sass

Chair Sass called for a motion to approve the minutes of the January 20, 2024 annual business meeting. **MOTION** by Rolanda Burney to approve the January 20, 2024 minutes as presented. Seconded by Asma Raouf; passed without objection.

III. Annual Business

Presenter: Michael Sass

A. Election of New Board Members

- Mia Casey, Executive Assistant, Baylor University (TX)
- Stephanie Horner, Assistant to the Dean, The College of New Jersey
- Brynne Pulver, Executive Assistant to the Vice Chancellor for Enrollment Management, University of North Carolina Greensboro
- Crystal Wilson, Administrative Director for the Office of the President Teachers College, Columbia University (NY)

Chair Sass called for a motion from the NAPAHE membership to approve the slate of candidates to the Board of Directors. **MOTION** by Rowena Clukey to approve the slate of candidates to the Board of Directors as presented. Seconded by Sheri Sargent; passed without objection.

B. Re-Election of Second-Term Board Members

The slate of current board members eligible for re-election who have accepted the invitation to serve a second 3-year term, as proposed by the nominating committee and recommended by the Board of Directors includes:

- Lynette Arner
- Jana Seutter

Chair Sass called for a motion that the NAPAHE membership approve the re-election of candidates to a second term on the Board of Directors as presented. **MOTION** by Heather Fehn to approve the re-election of candidates to a second term on the Board of Directors. Seconded by Stephanie Horner; passed without objection.

C. Re-Election of Honorary Board Member

Honorary Board Member, Marc Schaeffer, is eligible for re-election for a second and final 3-year term, as permitted by the bylaws, and has been recommended by the Nominating Committee and Board of Directors for such re-election.

Chair Sass called for a motion that the NAPAHE membership approve the re-election of Marc Schaeffer as Honorary Member of the Board of Directors as presented. **MOTION** by Heather Fehn to approve the re-election of Marc Schaeffer as Honorary Member of the Board of Directors. Seconded by Rowena Clukey; passed without objection.

D. Election of 2025-2026 Board of Officers

Pursuant to the proposal made by the Nominating Committee and recommended by the Board of Directors, in accordance with the current bylaws of the association, the slate of proposed 2025-2026 Board Officers is as follows:

- Rolanda Burney, Chair
- Lynette Arner, Chair-Elect
- Rowena Clukey, Secretary
- Tracy Labadie, Treasurer
- Michael Sass, Past-Chair

Chair Sass called for a motion that the NAPAHE membership approve the election of the 2025-2026 Slate of Officers as presented. **MOTION** by Sheri Sargent that the NAPAHE membership approve the election of the 2025-2026 Slate of Officers. Seconded by Edward Cullinane; passed without objection.

E. NAPAHE By-Law Amendments

On November 13, 2024, the NAPAHE Board of Directors considered and approved the slate of bylaw amendments.

Chair Sass called for a motion that, by the recommendation of the Executive Committee and the endorsement of the Board of Directors, the NAPAHE membership approve the slate of amendments to the bylaws for the Corporation as presented. **MOTION** by Edward Cullinane that the NAPAHE membership approve amendments to the bylaws for the Corporation as presented. Seconded by Stephanie Horner; passed without objection.

IV. Board Chair's Report

Presenter: Michael Sass

- Board Chair's Remarks
- Recognition of NAPAHE Board Members
- Recognition of Board Leadership
- Recognition of Board Members with Terms Ending
- Recognition of Conference Award & Grant Winners

Chair Sass expressed appreciation for the NAPAHE Board members and asked those in attendance to stand. He also presented the NAPAHE Distinguished Service Award to Dr. Adriel Hilton, for his significant and ongoing service, dedication, and passion for NAPAHE and furtherance of its mission and for the conference grant winners.

Recognition of NAPAHE Board Members:

- Lynette Arner, Conference Planning Chair
- Rolanda Burney, Chair-Elect, Nominations Committee Chair
- Rowena Clukey
- Eddie Cullinane, Professional Development Committee Chair
- Heather Fehn, Sponsorship Committee Chair
- Steve Frieder
- Mike Johnson, Immediate Past-Chair
- Michele Byerly, Communications Committee Chair
- Tracy Labadie
- Melissa Maszczak, Board Secretary, Membership Committee Chair
- Asma Raouf
- Marc Schaeffer (Honorary)
- Jana Seutter
- Don-Terry Veal
- Stuart Schmidt (Executive Director)

Recognition of Board Leadership

- Michael Sass, Board Chair
- Rolanda Burney, Chair-Elect
- Melissa Maszczak, Secretary
- Lynette Arner, Treasurer
- Michael Johnson, Immediate Past-Chair

Recognition of Board Members with Terms Ending

- Melissa A. Maszczak
- Asma Raouf
- Don-Terry Veal

Recognition of Conference Award Winner

- Dr. Adriel Hilton

Recognition of Conference Grant Winner

- Miranda Morris, Executive Administrative Assistant at Dakota State University

V. Treasurer's Report

Presenters: Tracy Labadie

Checking Account balance as of 1/15/25: \$133,412. 60

Investment Account balance as of 1/15/25: \$327,890.32

Tracy Labadie, treasurer-elect, presented the Treasurer's Report on behalf of outgoing treasurer, Lynette Arner. Tracy reported on the Mid-Year Budget and the NAPAHE 2025 Estimated Conference Income & Expense Report included in the materials.

Chair Sass called for a motion to accept the Mid-Year Treasurer's Report MOTION by Heather Fehn to accept the Mid-Year Budget, seconded by Edward Cullinane, passed without objection.

VI. Passing of the Gavel and Remarks

Presenters: Chair Michael Sass and Chair-Elect Rolanda Burney

Chair Sass passed the gavel to Chair-Elect Rolanda Burney who provided remarks of appreciation for Michael Sass's service as chair.

IV. New Business

Presenter: Chair Rolanda Burney

Chair Rolanda Burney called Asma Raouf to the stage to thank her for her service on the Board and present her with a parting gift.

VI. Announcements

Presenter: Executive Director Stuart Schmidt

VII. Adjournment

Chair Burney adjourned the meeting at 8:43 a.m. EST.

Submitted by Rowena Clukey

Slate of Candidates for New Board Directors 2026-2029



Susan England
Assistant to the Chancellor
University of Tennessee, Knoxville



Kelsea Gurski
Chief of Staff
University of Illinois Springfield



Gem Perkins
Executive Assistant to the Provost
The College of New Jersey



Christy Ruffner
Chief of Staff
University of Pittsburgh at Bradford



Trina Smith
Chief of Staff for Academic Affairs
Georgia Southern University



Jacob Wood
Chief of Staff
Northwest Missouri State University

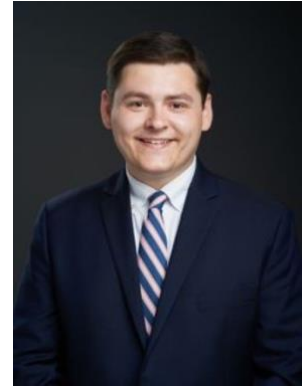
Slate of Second-Term Board Members 2026-2029



Rolanda Burney
Chief Administrative Officer
to the Dean of the College
of Arts and Sciences
Emory University



Rowena Clukey
Executive Director of the
Chancellor's Office
University of Maine System



Edward Cullinane
Director, Governance &
Presidential Engagement
Babson College

Slate of Board Officers 2026-2027



Board Chair

Lynette Arner
Executive Administrative Assistant
to the Office of the CEO
The James Cancer Hospital
The Ohio State University



Board Chair-Elect

Rowena Clukey
Executive Director of the
Chancellor's Office
University of Maine System



Board Secretary

Jana Seutter
Senior Assistant,
Office of the President
St. Ambrose University



Board Treasurer

Sheri Sargent
Chief of Staff and Vice President
for Administrative Services
Minnesota State University,
Mankato



Immediate Past Chair

Rolanda Burney
Chief Administrative Officer
to the Dean of the College
of Arts and Sciences
Emory University



Proposed Changes to NAPAHE's By-Laws December 2025

Proposed Amendment 1: Revised Membership Classifications Article III – Membership

ORIGINAL (to be omitted)

Sections 1.a. and 1.b.

- a. **Active Members.** Active membership status in the Corporation shall be open to any person who holds an administrative position and works in the office of the chief executive officer in any institution or system of higher education that is considered in good standing with the Corporation. Only active members of the Corporation shall have the power to vote on such matters as the Board of Directors may from time to time submit to the members for vote. Institutions shall be considered in good standing with the organization if the yearly dues assessed by the Corporation have been paid.
- b. **Associate Members.** Associate membership status in the Corporation shall be open to any person who, at any time in the past, has held a position in the office of a chief executive officer of an institution of higher education or system of higher education, or who is currently the assistant to the chief executive officer of an educationally-related institution, or is the assistant to the chief academic officer of an institution of higher education or other senior leaders within the system of higher education, or who expresses interest in the profession of presidential assistant, provided that such persons have paid any applicable membership dues set by the Board of Directors. Associate members of the Corporation shall not have the power to vote and shall not be included in quorum counts.

PROPOSED FINAL (replacing the omitted text)

Sections 1.a. and 1.b.

- a. **Professional Members.** Professional membership status in the Corporation shall be open to any person who currently works in the office of or directly supports a senior leader in higher education. Professional members of the Corporation shall have the power to vote on such matters as the Board of Directors may from time to time submit to the members and shall be eligible to serve on one or more committees. Members shall be considered in good standing with the organization if the yearly dues assessed by the Corporation have been paid.
- b. **Affiliate Members.** Affiliate membership status in the Corporation shall be open to any person who is not currently employed in a role that directly supports a senior leader in higher education but who maintains a professional interest in the field and who wishes to engage with the community of the Corporation. Affiliate members of the Corporation shall be eligible to serve on one or more committees. They shall not have the power to vote on such matters as the Board of Directors may from time to time submit to the members, and shall not be included in quorum counts.

RATIONALE FOR PROPOSED CHANGES

This amendment updates Article III to realign the association's membership classifications with the current membership demographics. NAPAHE's Board of Directors completed a business analysis in Fall 2024, during which they conducted a member survey. The survey results indicated a strong need to revisit the "Active vs. Associate" membership classification tiers to something more inclusive, equitable, and reflective of the current membership body. Note that this amendment includes updates to Article III, Sections 2-8, as well as Article IV, Section 2, to align with the aforementioned proposed member classifications.



Proposed Amendment 2: Administration of Human Resources

Article V – Officers and Administrative Staff

ORIGINAL (to be omitted)

Section 11. Administrative Staff.

At its discretion, the Board of Directors may, by resolution, advertise for and employ such Administrative Staff members as the Board deems necessary to complete the day-to-day work of the Corporation that is not feasible for the Executive Committee to undertake. Specific job descriptions and appropriate compensation will be determined by the Board, dependent upon the nature of the administrative duties needed.

PROPOSED FINAL (replacing the omitted text)

Section 11. Executive Director. At its discretion, the Board of Directors may, by resolution, advertise for and employ an Executive Director to manage the day-to-day operations of the Corporation. The Board shall determine the Executive Director's job description, establish appropriate compensation and benefits, monitor and evaluate performance, and terminate employment if necessary, in alignment with any existing contract, memorandum of understanding, agreement, and applicable law.

Section 12. Administrative Staff. The Executive Director shall have the authority to advertise for and employ such administrative staff members as deemed necessary to carry out the day-to-day work of the Corporation. The Executive Director shall determine specific job descriptions, establish appropriate compensation within the budget approved by the Board of Directors, monitor and evaluate performance, and terminate employment if necessary, in alignment with any existing contract, memorandum of understanding, agreement, and applicable law.

Section 13. Oversight. The Board of Directors retains ultimate oversight of all staffing decisions and may review administrative staffing policies and practices at its discretion.

RATIONALE FOR PROPOSED CHANGES

This amendment updates Article V to make the distinction between the employment responsibilities of the Board of Directors versus those of the Executive Director, adding a provision that the Executive Director, not the Board of Directors, is responsible for employing and carrying out the necessary human resources functions for all administrative staff. It also adds Section 13 on "Oversight" for all staffing decisions. This change is to take into consideration NAPAHE's growing staff. Note that this amendment also includes the updating of the organizational numbering of subsequent Sections under Article V.

Proposed Amendment 3: Nominating Committee Procedures

Article VI – Committees

ORIGINAL (with in-line omissions)

Section 3. Nominating Committee

There shall be a Nominating Committee appointed by the Chair, with the advice and consent of the Board, to nominate individuals as candidates for the Board of Directors and Officer positions. An effort will be made to ensure that candidates for the Board broadly represent the organization’s membership, including: ethnicity, gender, geographical regions, size, and types of institutions. The Committee shall also endeavor to achieve a Board that represents the diversity of location, institutional type, and personal background that characterizes higher education. ~~The Nominating Committee will seek input from the Executive Committee of the Board concerning suggestions for Officers for the following year, at least 120 days prior to the Annual Meeting. The committee will then consider potential candidates for available officer positions and will present a slate of officers and a rationale to the Board for their review and consideration 60 days prior to the Annual Meeting. The slate of Officers is then presented to the NAPAHE membership 45 days prior to the Annual Meeting (as per Article IV, Section 2) for their review.~~ Approval of Officers shall take place at the Annual Meeting.

PROPOSED FINAL

There shall be a Nominating Committee appointed by the Chair, with the advice and consent of the Board, to nominate individuals as candidates for the Board of Directors and Officer positions. An effort will be made to ensure that candidates for the Board broadly represent the organization’s membership, including: ethnicity, gender, geographical regions, size, and types of institutions. The Committee shall also endeavor to achieve a Board that represents the diversity of location, institutional type, and personal background that characterizes higher education. ~~The Nominating Committee will seek input from the Executive Committee of the Board regarding suggestions for officer positions for the upcoming term. After gathering input, the committee will review and consider potential candidates for available officer positions. The committee will then prepare and present a proposed slate of officers, along with a rationale for their selection, to the Board for review and consideration. Following Board review, the slate of officers will be shared with the membership in accordance with the provisions outlined in Article IV, Section 2.~~ Approval of Officers shall take place at the Annual Meeting.

RATIONALE FOR PROPOSED CHANGES

This amendment updates Article VI. Section 3 to remove procedural details that shall be added to the Committee’s policy/procedure documentation.



Proposed Amendment 4: Establishing a Finance Committee

Article VI – Committees

PROPOSED ADDITION

Section 9. Finance Committee. There shall be a Finance Committee appointed by the Chair, with the advice and consent of the Board, to oversee the Corporation’s preparation of the annual budget, monitor performance of the association in meeting its budgeted revenues and expenses, review the Corporation’s investment accounts, and ensure internal financial controls with clear separation of duties and adherence to nonprofit financial management best practices.

RATIONALE FOR PROPOSED CHANGES

This amendment formally establishes a Finance Committee to help oversee the Corporation’s finances, in alignment with NAPAHE’s 2025-2028 Strategic Plan goals. Note that this amendment also includes the updating of the organizational numbering of subsequent Sections under Article VI.



Proposed Amendment 5: Updating the Fiscal Year

Article VIII – Miscellaneous Provisions

ORIGINAL (with in-line omissions)

Section 1. Fiscal Year

The fiscal year of the Corporation shall ~~be the calendar year~~ or such other period as may be fixed by the Board of Directors.

PROPOSED FINAL

The fiscal year of the Corporation shall **begin on the first day of July and end on the last day of June**, or such other period as may be fixed by the Board of Directors.

RATIONALE FOR PROPOSED CHANGES

This amendment updates Article VIII. Section 1 to formally change NAPAHE's Fiscal Year in alignment with current business and accounting practices.



Non-Substantive Amendments

The following amendments correct the organizational structure, section numbering, grammar, syntax, and punctuation for these By-Laws. No substantive changes to the content or spirit of the By-Laws are proposed in these amendments.

Proposed Amendment 6: Member Types

Article III – Membership

PROPOSED CHANGES

- Updates the listed number of membership types from “two primary” to “the following” in the first sentence of Section 1.
-

Proposed Amendment 7: Honorary Board Members

Article III – Membership

PROPOSED CHANGES

- Removes the brackets around “three (3) year” in the sixth and seventh sentences of Section 1.d.
-

Proposed Amendment 8: Executive Committee

Article VI – Committees

PROPOSED CHANGES

- Adds a comma between “Secretary” and “the Treasurer” in the second sentence of Section 2.
-

Proposed Amendment 9: Communications Committee

Article VI – Committees

PROPOSED CHANGES

- Capitalizes “Committee” in the first sentence of Section 6.

39TH ANNUAL NAPAHE BUSINESS MEETING

BOARD CHAIR'S REPORT

Presented by Rolanda C Burney, Ph.D.

STRATEGIC PROGRESS AND ORGANIZATIONAL IMPACT

2025–2026 YEAR IN REVIEW: STRATEGIC PROGRESS AND IMPACT

Membership Growth and Engagement

The association achieved record-breaking membership growth by deepening engagement and expanding partnerships.

Strategic Planning and Governance

The board approved a multi-year strategic plan and fostered clear goals and open communication for success.

Digital Infrastructure Launch

Successful launch of new digital infrastructure improved operational maturity and member experience.

Conference and Event Management

Transition to an independent conference model with near-capacity registration demonstrated event management capabilities.



MEMBERSHIP GROWTH AND VALUE PROPOSITION



STRATEGIC PRIORITY: SUSTAINED MEMBERSHIP GROWTH

Historic Membership Milestone

NAPAHE surpassed 1,000 members for the first time, sustaining growth across multiple consecutive months.

Strategic Recruitment and Retention

Targeted recruitment and retention strategies resonated across diverse roles and institutions.

Enhanced Association Value

Increased membership strengthened financial stability and validated efforts to enhance value proposition.

Community and Networking

NAPAHE offers confidential forums, exclusive learning, and trusted networks to support higher education professionals.

FINANCIAL STEWARDSHIP AND OPERATIONAL WINS



FINANCIAL STEWARDSHIP: REVENUE AND COST SAVINGS

Membership Dues Overperformance

Membership dues collections reached 114% of budget, providing budget flexibility and reducing financial risk.

Tax Exemptions Savings

Secured Texas state tax exemptions saved over \$13,000 on conference expenses, reducing operating costs.

Sponsorship Revenue Diversification

Achieved \$40,000 sponsorship goal, diversifying revenue and demonstrating confidence in the association's leadership.

Board Leadership and Commitment

Every member of the Board of Directors supported the conference through sponsorship, reflecting shared responsibility for the strength and sustainability of NAPAHE.

MEMBER ENGAGEMENT AND DIGITAL INFRASTRUCTURE



MEMBER ENGAGEMENT & INFRASTRUCTURE: DIGITAL TRANSFORMATION

Successful Platform Launch

The YourMembership platform launch in May 2025 consolidated multiple tools and attracted over 500 logins in the first week.

Enhanced Member Engagement

The digital transformation improved connections, communication, and access to resources for members, fostering stronger engagement.

Efficient Infrastructure

Replacing aging systems with a unified platform enabled more efficient and effective member interactions and scalable growth.

Tailored Professional Resources

The platform supports confidential forums, exclusive learning, and on-demand resources tailored for higher education professionals.

PROFESSIONAL DEVELOPMENT AND PROGRAMMING EXPANSION

PROFESSIONAL DEVELOPMENT: SUMMER WELLNESS SERIES

Expanded Professional Programming

NAPAHE launched a six-part Summer Wellness Series in 2025 to extend engagement beyond the annual conference.

Member Wellbeing Focus

The series emphasized member wellbeing and career growth through targeted webinars and leadership workshops.

Supporting Diverse Roles

Programming addresses unique needs of presidential assistants and professionals supporting higher education leaders.

Commitment to Continuous Growth

NAPAHE demonstrates dedication to the profession by enhancing wellness and professional development offerings year-round.



ORGANIZATIONAL CAPACITY AND GOVERNANCE

ORGANIZATIONAL CAPACITY: STAFFING AND STRATEGIC PLAN

Staffing Expansion

Hiring the first Membership Experience Manager expanded capacity for member engagement and data-driven decisions.

Strategic Plan Approval

Board-approved multi-year strategic plan aligns priorities and strengthens governance for long-term success.

Plan Implementation


Implementation began with tools and consultant support, turning strategy into actionable steps.

Sustainable Growth

New staffing and strategic alignment support growth without overextending leadership capacity.



CONFERENCE MODEL AND EVENT SUCCESS



CONFERENCE MODEL SUCCESS: INDEPENDENT OPERATIONS

Registration Milestones

Achieved 25% registration shortly after launch and 94% by January 2026, validating the new operational model.

Financial Stability

New model reduced financial uncertainty and improved cash flow predictability for the conference.

Strategic Planning and Continuity

Secured 2027 venue contracts, showcasing proactive planning and long-term organizational stability.

Core Conference Benefits

Conference offers professional development, networking, and inspiration to over 400 colleagues annually.

LOOKING AHEAD: STRATEGIC PLAN IMPLEMENTATION

LOOKING AHEAD: SUSTAINED GROWTH AND STABILITY

Strategic Plan Implementation

The 2025–2028 Strategic Plan is being actively implemented with tools and regular consultant check-ins to drive accountability and momentum.

Member Engagement and Financial Stewardship

Focus on member involvement and sound financial management ensures sustainable growth and organizational stability.

Conference Success and Future Planning

Near-capacity registrations and secured venues highlight the association's relevance and proactive future planning.

Aligned Leadership for Future Needs

Board, staff, and committees are aligned to meet evolving needs supporting higher education professionals effectively.



FISCAL YEAR 2025-2026 MID-YEAR FINANCIAL NARRATIVE

Respectfully Prepared by:
 Stuart J. Schmidt, Executive Director
 Sheri Sargent, Treasurer
 For the Annual Business Meeting: March 13, 2026

Synopsis

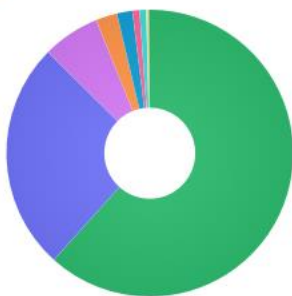
The following report generally covers the first six (6) months of NAPAHE’s Fiscal Year (FY) – July 1, 2025, through December 31, 2025.

Expense Report

As of December 31, 2025, all bills are current. Financial records are finalized through this date. NAPAHE spent \$215,479.02 of our budgeted \$423,425.00 in expenses to date. We have 49% or \$207,945.98 remaining for the fiscal year.

Spending by category FYTD follows:

Spending



NAPAHE Conference Exp...	\$132,873.34
Management Services	\$55,572.28
Technology	\$13,890.28
Membership (HE Direct...	\$5,223.00
Administrative Busine...	\$3,762.51
Insurance	\$1,709.00
Administrative Travel...	\$1,609.81
Accountant Fees (Taxe...	\$619.80
Non-Profit Filing Sta...	\$219.00

\$215,479.02
7/1/25 - 12/31/25

Income Report

NAPAHE collected \$318,194.27 of our budgeted \$423,425.00 in income to date. This makes up 75% of NAPAHE’s budgeted income for the fiscal year.

Income by category FYTD follows:

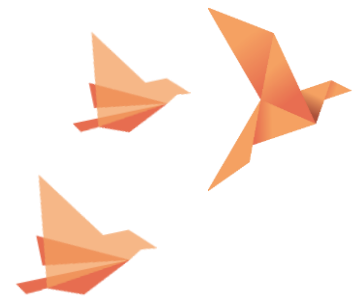
Income



Conference Income	\$227,124.00
Membership Dues	\$61,350.27
Sponsorship	\$26,000.00
Optional/Networking A...	\$3,220.00
Misc. Other Income	\$500.00

\$318,194.27
7/1/25 - 12/31/25

NAPAHE Fiscal Year 2025-2026 Budget				
	Updated 1/5/2026 by Stuart Schmidt			
			As of 12/31/2025	
		Proposed FY26	Actual FY26	%
INCOME				
	Membership Dues	\$ 130,000.00	\$ 61,350.27	47.2%
	Networking Activity Fees	\$ 3,000.00	\$ 3,220.00	107.3%
	Sponsorships	\$ 40,000.00	\$ 26,000.00	65.0%
	Conference Registration/Income	\$ 250,425.00	\$ 227,124.00	90.7%
	Misc. (Other Income)	\$ -	\$ 500.00	
	TOTAL INCOME	\$ 423,425.00	\$ 318,194.27	75.1%
EXPENSES				
	Management Services	\$ 106,195.00	\$ 55,572.28	52.3%
	External Services	\$ -	\$ -	
	Non-Profit Status Filing	\$ 374.00	\$ 219.00	58.6%
	Accountant Fees / Taxes	\$ 2,930.00	\$ 619.80	21.2%
	Insurance	\$ 2,250.00	\$ 1,709.00	76.0%
	Membership	\$ 11,250.00	\$ 5,223.00	46.4%
	Administrative Travel Expenses	\$ 6,400.00	\$ 1,609.81	25.2%
	Summer Planning Meeting	\$ 2,000.00	\$ -	0.0%
	Technology	\$ 18,753.00	\$ 13,890.28	74.1%
	Administrative Business Expenses	\$ 7,398.00	\$ 3,762.51	50.9%
	Conference Expenses	\$ 262,875.00	\$ 132,873.34	50.5%
	Grants for Conference	\$ 3,000.00	\$ -	0.0%
	Transfer to Investment	\$ -	\$ -	
	TOTAL EXPENSES	\$ 423,425.00	\$ 215,479.02	50.9%
TOTAL INCOME-EXPENSES (PROFIT)		\$ -	\$102,715.25	
Checking 6/30/2025: \$106,265.14		As of 12/31/25:	\$ 208,980.39	
Investment 6/30/2025: \$353,712.86		As of 12/31/25:	\$ 377,686.52	



NAPAEHE
Professionals Supporting Higher Education Leaders

2025-2028 Strategic Plan



Approved & Adopted November 13, 2025

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clarity • alignment • growth

Strategic Planning Process: Phase 1



Market Assessment

- Situational Review
- Interviews
- Planning Questionnaire
- Competitive Analysis
- Trends Analysis
- Market Sizing



Member/ Nonmember Survey

- Perceptions of NAPAHE
- Wants/Needs
- Preferences
- Value Proposition

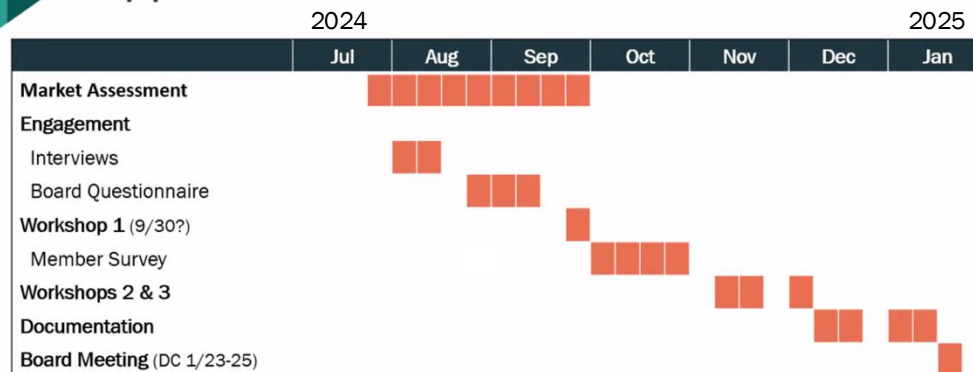


Workshops/ Discussions

- Futures Workshop
 - Impact of Landscape
- Strategic Conversations
 - Target Audience
 - Member Classifications
 - Ideal size
 - Scope & Mission
 - Implications of growth
 - Conference
 - Resources



Approximate Timeline





Business Analysis & Planning Elements





Vision & Strategy

NAPAHE recently updated its vision and mission statements to capture an increased focus on attracting and embracing members beyond its traditional base. The mission creates focus around programming, networking and professional development. Delivering fully on member expectations will require segmentation and building additional professional development opportunities. This and other areas of opportunity such as membership growth, a new conference delivery strategy, and ensuring appropriate resourcing will need to be balanced when prioritizing NAPAHE's strategic goals for the next three years.

Competitive Landscape

NAPAHE enjoys a positive reputation and a unique market position within higher education. Relative to competitors, NAPAHE has a positive energy and is known for the quality of its professional development and other programming. Paying attention to competitors' affinity groups focused on NAPAHE's market will be important to ensure NAPAHE remains the association of choice for administrative professionals including CoS and Presidential Assistants.

Market Opportunity

With 3,542 higher education institutions in the US, there is significant opportunity to continue to grow domestically where NAPAHE has a very positive reputation and strong foothold. Growing within existing institutions should be low hanging fruit. There is also room to continue to expand into more public institutions and other higher education institutions across the US while welcoming those who find their way to NAPAHE from other English-speaking countries.

Trends

Shrinking budgets and leadership turnover create potential headwinds for NAPAHE to continue to grow. Increased political polarization and regulatory changes may impact individuals' ability or willingness to become members of NAPAHE and participate in its programs. On the other hand, NAPAHE's ability to support members in navigating these changes could make it even more valuable. Leveraging technology to support the work of NAPAHE staff and volunteers could increase efficiency and be cost effective while increasing membership value.

Membership

NAPAHE has already made the strategic decision to broaden its membership to include all professionals supporting higher education leaders. This strategic decision has led to membership growth of 17% and 21% over the past two years and 69% growth in conference attendance over the same period. NAPAHE has a very high overall satisfaction rating (97% satisfied, and 51 NPS) with an 82% retention rate. That said, Associate members are slightly less satisfied than Active members and report feeling less welcome despite valuing the same services. Eliminating the distinction between Active and Associate for membership should be considered. Membership dues should also be restructured to reflect the perceived value received.

Value Proposition

NAPAHE provides networking, professional development, and career and industry resources to those supporting higher education's leaders to enable them to be better at their jobs, showcase their professionalism and expertise, and better advocate for their own needs. Largely, Active and Associate members see the same value in membership, the conference, and NAPAHE's products, programs and services. But Chiefs of Staff and Presidential Assistants still need time and space to be alone together and for their considerable experience to be recognized in ways that are visible in the marketplace.

Products, Programs & Services

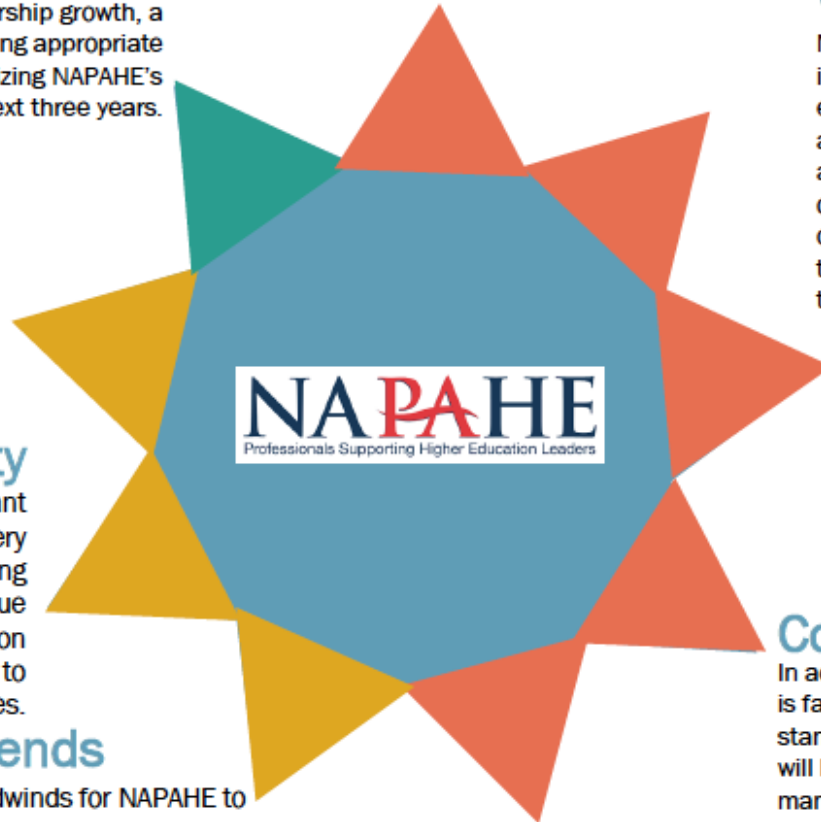
NAPAHE's PPS are well received by members and known to be high quality. At the same time, members would like to see more professional development programs and resources. This is one of the reasons members turn to other associations and one of their top asks of NAPAHE over the next few years. Skills training on emerging technologies and digital competencies is of particular interest, as are certificate or certification programs.

Conference

In addition to a loud minority of voices asking for a change of venue, NAPAHE is facing restrictions on its ability to grow conference in its current form. A standalone model may be a path to growth, but complete financial modeling will be necessary to make an informed decision. The current conference management fees seem high, but hiring resources with all of the necessary resources may also be expensive. Considering staff-based, volunteer, and outsourced options will be important to find the right solution.

Resources

NAPAHE has managed to grow effectively with a staff of one and significant volunteer support. Given members' passion for the organization, this may be a sustainable model for incremental growth. However, reaching new markets, delivering new products, and shifting the conference to standalone will likely require additional human and financial resources. Today's gig economy offers a path to growth through contractors rather than additional employees, but managing these resources also takes time. Finding the right balance for NAPAHE will be critical.



Strategic Planning Process: Phase 2



Organizational Assessment

- ✓ Document Review
- ✓ Interviews
- ✓ Focus Groups



Workshops & Documentation

- Virtual Planning Workshop
 - Visioning
 - Draft Goals
- In-Person Planning Workshop
 - Objectives
 - Vision & Mission Statements
- In-Person Board Governance Workshop
- Plan Draft & Refinements
- Strategy-on-a-Page

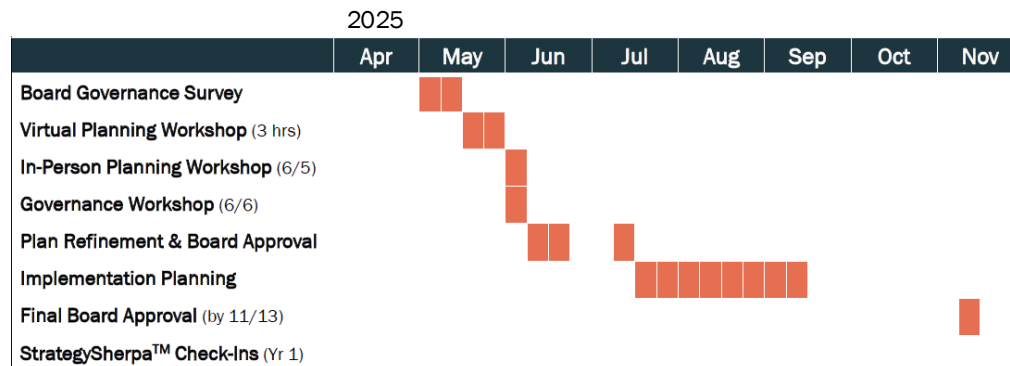


Implementation Planning

- Strategy Implementation Plan
 - Action Steps/Tactics
 - Strategic Roadmap
 - Resource Assignments
- Progress Tracker
- Identification of Measures of Success (KPIs)



Approximate Timeline





Strategic Plan Goals

1

Deliver intentional, member-driven professional development that elevates our members' knowledge and expertise, recognizes diverse career paths, strengthens affinity groups, and fosters continuous growth.

2

Produce a nationally recognized, independent annual conference that delivers relevant programming, fosters meaningful connections, and catalyzes member engagement.

3

Grow and sustain a diverse national membership by promoting NAPAHE's value and deepening and broadening our institutional reach.

4

Strengthen NAPAHE's organizational foundation through strong governance, clear leadership pathways, and resources aligned to support scalable growth and long-term stability.



2025-2028 Strategic Goals

1

Deliver intentional, member-driven professional development that elevates our members' knowledge and expertise, recognizes diverse career paths, strengthens affinity groups, and fosters continuous growth.

1. Fully assess and define the range of professional development needs of our current and potential membership through a comprehensive research process.
2. Develop a gap analysis of our existing professional development content based on the research from 1.1.
3. Create a multi-year plan for enhancing our offerings based on the findings from 1.1 and 1.2.
4. Strengthen affinity groups by establishing leadership structures, expanding opportunities for connection, and developing specialized content relevant to their roles.



2025-2028 Strategic Goals

2

Produce a nationally recognized, independent annual conference that delivers relevant programming, fosters meaningful connections, and catalyzes member engagement.

1. Profitably deliver our first independent annual conference in 2026 while maintaining or improving attendee satisfaction scores.
2. Establish a process and quantifiable annual goal to ensure conference programs consistently focus on current industry trends and emerging technologies.
3. Determine signature on-site elements (environments and activities) that promote dialogue and collaboration to enable conference attendees to make meaningful connections.
4. Increase the number of members attending the conference year-over-year throughout the strategic plan period.
5. Establish the annual conference as a driving force in member connection to NAPAHE.



2025-2028 Strategic Goals

3

Grow and sustain a diverse national membership by promoting NAPAHE's value and deepening and broadening our institutional reach.

1. Develop and implement a marketing strategy to promote our value to potential members and key influencers.
2. Expand our reach within the institutions of current members to appropriately include more functional area representatives.
3. Increase and diversify the number of institutions represented by NAPAHE members to include a wider variety of institutional types and more diverse regional representation.
4. Understand what is driving retention and use it to inform our programmatic and engagement efforts with potential new members.
5. Implement an annual member survey that goes beyond demographics to better understand engagement and value of NAPAHE and its programs.



2025-2028 Strategic Goals

4

Strengthen NAPAHE's organizational foundation through strong governance, clear leadership pathways, and resources aligned to support scalable growth and long-term stability.

1. Review and revise our bylaws to ensure appropriate member categories, committee structure, annual meeting timing, and officer terms.
2. Establish processes for reviewing and updating committee charters on a regular basis and encouraging engagement of additional volunteers.
3. Establish leadership succession plans (board and staff) and a pipeline and development process for new board candidates.
4. Implement a skills matrix process as part of board nominations to ensure intentional recruitment of leaders with the necessary skills and attributes to enable NAPAHE's strategic direction.
5. Develop a budgeting practice that designates appropriate resources, including staff, systems, and other expenses through a balanced annual budget.



NAPAHE Mission Statement

NAPAHE strengthens the professions of its members through programming, networking, and professional development opportunities that address the broad range of roles fulfilled by professionals who support higher education's senior leaders.

NAPAHE Vision Statement

To be the association of choice for professionals who support leaders in higher education.



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- ▷ FutureFIRST™ Strategic Planning
- ▷ Leadership Capacity Building
- ▷ Foresight Workshops
- ▷ Market Research (Qual & Quant)
- ▷ Product & Service Strategy
- ▷ Meeting Facilitation & Keynotes

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