



## Strategic Plan 2008

### *Goals & Strategies*

A document to guide NEAIR through the next 3-5 years

#### Strategic Planning Committee Members

Heather Kelly, Chair  
Corby Coperthwaite  
Mary Ann Coughlin  
Emily Dibble  
Michael Dooris  
Denise Krallman  
Michael Middaugh  
Mitchell Nesler  
Jessica Shedd  
Steve Thorpe  
James Trainer  
Chris Winters

#### Steering Committee Members

Denise Krallman, President  
Mitchell Nesler, President-Elect  
Martha Gray, Past President  
Kevin Murphy, Secretary  
Eleanor Swanson, Treasurer  
Heather Kelly, Past Treasurer  
Cherry Danielson, Program Chair  
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Bonnie Thomas, Publications Chair  
Jeff Himmelberger, Member-At-Large  
Mark Palladino, Member-At-Large  
George Rezendes, Member-At-Large  
Community College Sector  
Heather Roscoe, Member-At-Large  
Jessica Shedd, Member-At-Large  
Allison Walters, Member-At-Large

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## **Strategic Plan 2008 Mission, Value & Vision Statements**

### MISSION

NEAIR is an individual membership driven organization that promotes institutional effectiveness in postsecondary education through excellence in the field of institutional research. As such, NEAIR focuses on facilitating the professional development of its members while promoting best practice and ensuring integrity in institutional research. Central to the fulfillment of this mission are the following core values:

### CORE VALUES

We value: (1) a rich and diverse community of members that reflect the various sectors of postsecondary education and is welcoming to individuals with different backgrounds, experiences, and skills; (2) the open exchange of ideas through collegiality and networking; and (3) the ongoing professional development of members throughout the span of their career.

### VISION

NEAIR aspires to be a premier member services organization by providing the best possible services that promote and strengthen the skills and knowledge of the institutional research profession in an ever changing world.



## **Strategic Plan 2008 Professional Development**

Goal: To provide quality and relevant professional development for NEAIR members.

Strategy: Offer a broad range of professional development opportunities for institutional researchers at all stages of their careers.

- Review and monitor current services and programs.
- Identify, develop, and promote training for skills needed for career development in postsecondary education.
- Identify, develop, and promote professional development opportunities for seasoned institutional researchers.
- Encourage best practice in the field of institutional research.

Strategy: Provide opportunity for NEAIR members to develop and improve oral and written communication skills.

- Strengthen the conference proposal process.
- At member's request, evaluate conference papers and presentations in order to provide constructive feedback.

Strategy: Develop multiple modes and settings of delivery for professional development offerings.

- Evaluate success and consider continuation of web-based workshops.
- Foster relationships with institutions that can provide and support a variety of delivery modes.
- Encourage IR office to IR office connections.



## **Strategic Plan 2008 Membership Growth**

Goal: To be responsive to natural and evolutionary growth as a result of changing demands in postsecondary education.

Strategy: Develop methods to monitor membership counts and composition over time.

- Anticipate growth in light of how the organization can best fulfill its mission and promote its “NEAIRINESS” [a.k.a. personal touch, hospitality, and collegiality].
- Site selection for annual conferences will consider current and potential organizational growth.

Strategy: Ensure the organizational structure and staffing of NEAIR reflects changes in NEAIR membership counts and composition.

- Review Association’s governance structure in relation to membership growth.
- Broaden opportunities for members to volunteer for smaller tasks necessary for the smooth operation of the Association.
- Evaluate roles and responsibilities of Administrative Coordinator.
- Develop contingency plans for Administrative Coordinator responsibilities.



## **Strategic Plan 2008 Leadership & Governance**

Goal: To strengthen the governance structure to ensure that it is effective in supporting the mission of the Association and representative of the membership.

Strategy: Encourage involvement of highly qualified individuals into leadership positions within the Association.

- Establish a formal program of mentorship for interested members who are identified as prospective Steering Committee members. These individuals would be provided a formal orientation as to what is expected from a Steering Committee member, the skills they need to bring to the table, and the impact of Steering Committee service on their careers in institutional research. Past presidents might make a good resource group for such a mentorship program.
- Provide support for members interested in additional leadership roles.

Strategy: Establish ongoing evaluation of the Association's governance structure.

- Assess the level of membership involvement in governance: individuals who are elected, appointed, and volunteer.
- Assess composition of Steering Committee (i.e., size, ad hoc versus standing committees, etc.).
- Make best use of members who run for office but are not elected.



## **Strategic Plan 2008 Financial Management**

Goal: To adopt best practices for financial management and long term fiscal health.

Strategy: Implement policies and procedures such that membership fees support the operational expenses for the Association, while net revenue-expenses for annual conferences are utilized to support NEAIR's mission.

- Incremental increases for membership and conference fees need to be established. These increases should be based on projected expenses and revenues.
- Increase the fund balance to cover 100% of annual operating costs and conference expenses.

Strategy: Establish a financial investment policy.

- Explore the establishment of a finance committee.
- Seek sound financial and investment advice.
- Propose philosophy for investment instruments.
- General financial policies need to be regularly reviewed and updated.

Strategy: Appoint an Audit Committee that will annually review the Association's books for a given fiscal year.

- Ensure there is appropriate documentation of expenditures and revenues.
- Review the financial transactions for accuracy and clarity, as well as the use of appropriate budget categories.
- Evaluate compliance with Steering Committee policies on financial matters.



## **Strategic Plan 2008 Member Services**

Goal: To continually provide members quality information and services.

Strategy: Increase level of appropriate technology used by NEAIR to deliver information and services to membership.

- Seek opportunities to increase resources in the “Member Only” section of Association website. Potential opportunities include archiving NEAIR listserv questions, creating an “experts” database, and making appropriate online tutorials available to members.
- Explore establishing new listservs or blogs for special interest groups.
- Develop a “Frequently Asked Questions” page on Association website.
- Utilize technology, when appropriate, to keep NEAIR members apprised of the latest postsecondary education policy issues.

Strategy: Define, clearly, the difference between “Newcomer to NEAIR” and “New to IR” in order to provide appropriate services while advocating and promoting the field of institutional research.

- Continue established Mentor Committee activities.
- In addition to the Mentor Committee, explore concept of establishing Newcomer and Membership Committees.

Strategy: Strengthen relationship with affiliated groups.

- Increase communication with affiliated groups.
- Explore collaborations with affiliated groups.
- Increase cross-promotion of programs.