



Strategic Plan 2008
2012 Progress Report

Goal – Professional Development: To provide quality and relevant professional development for NEAIR members.			
<i>Strategy</i>	<i>Action Steps</i>	<i>Responsible Committee</i>	<i>Outcomes</i>
Offer a broad range of professional development opportunities for institutional researchers at all stages of their careers.	Review and monitor current services and programs.	PDS & Conference Team Ongoing	PDS committees have offered summer workshops in both face to face formats as well as online. The instructional approach depends on site facilities and presenter preferences.
	Identify, develop, and promote training for skills needed for career development in postsecondary education.		PDS committees and Conference teams have provided a wide range of training for members new to the profession as well as those with mid- or late-career. Over 300 member participants have attended PDS training in survey research, statistical methods, IR best practices, IPEDS, and emerging topics. Approximately 15-18 preconference workshops are provided which include opportunities for seasoned IR professionals and highlight new challenges.
	Identify, develop, and promote professional development opportunities for seasoned institutional researchers.		
	Encourage best practice in the field of institutional research.		
Provide opportunity for NEAIR members to develop and improve oral and written communication skills.	Strengthen the conference proposal process.	Conference Team Ongoing	Conference teams have used the AIR/contractor supported conference proposal system for a number of years. The proposal system includes a blind review component. Blind reviews are used to evaluate proposal quality and appropriateness. Reviewer feedback is provided to presenters where appropriate.
	At member's request, evaluate conference papers and presentations in order to provide constructive feedback.		A peer evaluator was offered to presenters during the XXX conference. It was met with limited requests. Other conference teams have discussed having a process but have not moved forward. Individual PDS and pre-conference workshops, as well as the conference as a whole are evaluated now using a web-based form. Workshop evaluations are shared with presenters and used by the next conference team to assist in decision making.
Develop multiple modes and settings of delivery for professional development	Evaluate success and consider continuation of web-based workshops.	PDS & Conference Team	PDS committees have offered summer workshops in both face to face formats as well as online. The instructional approach depends on site facilities and presenter preferences.



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professional development offerings.	Foster relationships with institutions that can provide and support a variety of delivery modes.		facilities and presenter preferences.
	Encourage IR office to IR office connections.		

Goal – Membership Growth: To be responsive to natural and evolutionary growth as a result of changing demands in postsecondary education.			
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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].	Membership Committee Ongoing	The structure of the Membership Committee has evolved during the time covered by this report. During 2008 – 2009, the Mentor and Newcomer Program Committee helped new members establish substantive contact with experienced practitioners of institutional research. Activities included a mentoring program, a mentoring reception at the annual conference, newcomer outreach (including conference dinner groups and welcome packets), and maintaining a membership resource database. In 2010, the committee was restructured to the Membership Committee to broaden the scope of the Committee’s work to the entire membership to encourage more participation and usage of member benefits, as well as consider additional benefits NEAIR may provide to its members.



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	Site selection for annual conferences will consider current and potential organizational growth.	Site Selection Ongoing	<p>The Site Selection Committee is chaired annually by the President-Elect and selects a site two years in the future. In 2011, the NEAIR Steering Committee endorsed the NEAIR “Standard Conference Experience” document. That document contained minimum suggested guidelines related to professional development opportunities and fiscal management. Specific guidelines were included for site selection. In addition, a spreadsheet was developed to better estimate future conference costs. Generally, the committee includes the Treasurer, a former local arrangements chair, and the administrative coordinator.</p> <p>The conference is rotated around the region. Future and past sites selected during the 2008-2011: Newport, RI, Bethesda, MD and Boston, MA. The conference is generally held in November, with the exception of the Boston conference in 2011 (December). Sites are approved by the Steering Committee annually.</p>
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.	Steering Committee Ongoing	For the past three years, the Steering Committee has explored incorporation to protect both the organization and board members. Changes have been made to the Treasurer’s processes to adhere to accounting practices as well as preparing for incorporation. Committees and their status are also under review currently.
	Broaden opportunities for members to volunteer for smaller tasks necessary for the smooth operation of the Association.	All committees	The annual conference provides the best volunteer opportunities. Committee service offers limited options.
	Evaluate roles and responsibilities of Administrative Coordinator.	NEAIR President Ongoing	The roles and the responsibilities of the Administrative Coordinator are reviewed before the RFP is distributed.



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	Develop contingency plans for Administrative Coordinator responsibilities.	Steering Committee	



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Goal – Leadership and Governance: To strengthen the governance structure to ensure that it is effective in supporting the mission of the Association and representative of the membership.			
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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.	??	Per the NEAIR constitution, the Nominating Committee’s work includes the solicitation of nominees for elected leadership positions, selection of candidates for the ballot, overseeing the election process, and notifying members of the election results. It has not been expanded to address this action item.
	Provide support for members interested in additional leadership roles.	??	
Establish ongoing evaluation of the Association’s governance structure.	Assess the level of membership involvement in governance: individuals who are elected, appointed, and volunteer.	Steering Committee	For the past three years, the Steering Committee has explored incorporation to protect both the organization and board members. Changes have been made to the Treasurer’s processes to adhere to accounting practices as well as preparing for incorporation. Committees and their status are also under review currently.
	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.		



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Goal – Financial Management: To adopt best practices for financial management and long term fiscal health.			
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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.	Steering Committee	Since 2011, the Steering Committee has discussed and approved the next fiscal year budget during the spring. Membership fee levels are discussed at that time.
	Increase the fund balance to cover 100% of annual operating costs and conference expenses.		Profits from the annual conference are applied to the fund balance. The goal is to cover the cost of one year contracted conference expenses.
Establish a financial investment policy.	Explore the establishment of a finance committee.	Ad Hoc Finance Committee	Established in 2009 as an ad hoc advisory committee reporting to the NEAIR Steering Committee, the finance committee oversees the development of the annual budget, ensures the accurate tracking, monitoring and accountability of organization funds, and ensures adequate financial controls are being maintained. Ongoing efforts of the finance committee include recommending policies and procedures that provide suitable financial controls and management of NEAIR’s assets.
	Seek sound financial and investment advice.		
	Propose philosophy for investment instruments.		
	General financial policies need to be regularly reviewed and updated.		
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.	Ad Hoc Finance Committee	An annual audit committee reviews the financial transactions of the organization using generally accepted accounting standards. Budget categories have evolved over time. The current Treasurer has moved to Quickbooks to facilitate tracking and payment.
	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.		



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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.	Technology and Membership Committees Ongoing	The structure of the Technology Committee also evolved during the past four years. During 2008-2009, the group functioned as the Web Advisory Committee. The purpose of the Web Advisory Committee was established to develop a website for the association in order to better communicate with members and the broader IR community. Since the development of the website, this committee has evolved to provide more comprehensive technology services to the association and its members. The Committee name changed to the Technology Committee in 2010 to address the various needs of both the membership as well as the operation of the Association. The committee change coincided with the shift from an AIR supported NEAIR site to the YourMembership (YM) system. The Committee was instrumental in the evaluation and implementation of YM. Committee members support other committees to ensure that information is up-to-date in YM. The Administrative Coordinator has taken on additional responsibilities related to maintenance of the YM system as well as its polling features and event registration.
	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.		
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.	Membership Committee	See earlier comment about the membership committee
	In addition to the Mentor Committee, explore concept of establishing Newcomer and Membership Committees.	Ongoing	
Strengthen relationship with affiliated groups.	Increase communication with affiliated groups.	All Committees	



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