NATIONAL ASSOCIATION OF COLLEGE AUXILIARY SERVICES

STRATEGIC PLAN
2006 – 2010

July, 2006

INTRODUCTION

NACAS has the opportunity to maintain and build on several significant strategic initiatives while introducing a few new additional strategic actions over the coming years. It is important for NACAS to maintain its strategic focus on enhancing professional development activities, encouraging diversity in membership, growing the Foundation, maintaining the strength and vitality of NACAS Regions, and continuing to foster the dynamic relationship with Business Partners while addressing new initiatives related to financial planning, developing an academic track for future auxiliary service leaders, clarifying and promoting the NACAS brand, enhancing recruitment and retention of members, establishing a retiree/mentoring program, developing a system of measurable targets and measuring actions, along with employing new information technology to create a more virtual and global organization.

MISSION

NACAS provides professional development and leadership opportunities necessary for its members to be successful as they support higher education through auxiliary/campus services in an ever-changing environment.

VISION

NACAS is universally acknowledged as the premier source for educational opportunities, campus service innovation, leadership skill development, and information networking for auxiliary services professionals.

VALUES

NACAS is committed to ethical and value-driven decision making essential to ensuring fiscal responsibility inherent in higher education's auxiliary services. NACAS embraces values that provide:

Commitment to student and institutional learning success;

- Focus on operational quality, service, innovation and value in a competitive environment;
- Responsiveness to service and product needs of all constituencies;
- Identification of “best practices” in our professional services areas;
- Dedication to leadership development for all professionals that we reach;
- Commitment to inclusiveness of all people, cultures, and nations;
- Commitment to integrity;
- Commitment to sustainability;
- Commitment to the measurement of success and establishment of necessary standards;
- Understanding that the commitment of the association is to the key stakeholders in the higher education community and involves all governance decisions.

STRATEGIC DIRECTIONS

In combining new and established priorities, NACAS will focus on seven strategic areas.

1. **Develop and provide best in class professional development programs for auxiliary service professionals**.

    a. Critically examine professional development programs in relation to evolving auxiliary services core competencies.
    b. Continue current professional development programs, complete the development of the Management Institute program, and develop or cooperate in the development of new programs necessary for auxiliary professionals now and in the future.
    c. Develop a specific academic track for future auxiliary leaders, partnering with a university.
    d. Establish a retirees/mentoring resource bank.

2. **Enhance NACAS' position as the premier association for auxiliary services professionals.**

    a. Place greater emphasis and resources on marketing.
    b. Develop a brand and broadly implement its use.
    c. Consider changing the name or adding a tag line to clarify what NACAS is about.
    d. Develop activities that enhance the image of both NACAS and auxiliary services professionals.
    e. Confirm that our activities meet the diverse needs of our members.

3. **Build and diversify the membership.**

    a. Develop a plan for recruitment and retention.
    b. Increase involvement with under-represented institutions and members, including emerging professionals, students, women and minorities.
    c. Develop a multi-layered approach to membership growth.
    d. Embrace a wider range of business partner organizations.

4. **Generate and manage financial resources to accomplish goals.**

    a. Develop a financial plan that provides fiscal stability for the association.
    b. Develop financial goals and resources necessary for NACAS to accomplish its national and regional goals.
    c. Develop a long-term plan for NACAS facilities.

5. **Continue to improve internal operations to fulfill organization mission, achieve goals, and enhance management.**

    a. Use new technology to create a more global organization.
    b. Implement a strategic management system.
    c. Model sustainability concepts.
    d. Coordinate efforts to regularly and systematically assess member and auxiliary service needs and expectations.

6. **Provide support to regions**.

    a. Enhance the professional development opportunities in the regions.
    b. Increase participation in the regional conferences and workshops around those conferences.
    c. Enhance the regions by providing greater access to future leadership and provide programs to educate and support regional leadership.

7. **Strengthen the NACAS Educational Foundation to enable the funding of programs and services designed to enhance the auxiliary services profession.**

    a. Fund programs that will enhance the future of auxiliary services and NACAS.
    b. Continue to encourage business partners and members to contribute to the Foundation.

ACTIONS, MEASURES, AND GOALS

1. **Develop and provide best in class professional development programs for auxiliary service professionals.**

    a. Develop professional development programs based on evolving auxiliary services core competencies. *Staff will take the lead in defining those core competencies in 2006 – 2007. Monographs will be expanded in 2007 – 2009. One goal is to develop a book by 2009.*

    b. Complete the development of the Institute for Managers program and develop or cooperate in development of new programs necessary for auxiliary professionals now and in the future. *National staff will continue Institute for Managers Year I, and establish the Institute for Managers Year II by 2007. The Advanced Leadership Academy will be developed and offered by 2007. A catalog of offerings will be provided by 2007. Expanded webinar capabilities will be an established part of the curriculum by 2007.*

c. Develop a specific academic track for future auxiliary leaders, partnering with a university. *Form a team with the Director of Education and work with the Professional Development Committee to identify a partner institution in 2006. Develop this program with a goal of completion in the 2009 – 2011 time frame.*

d. Establish a retirees/mentoring resource bank. *Develop a mission for the retiree group in 2006. Provide retirees as a professional development resource to the members. Develop an inventory bank of retirees and skills in 2007 and include in the MIS system. Begin to advertise this resource bank in 2007.*

MEASURES: Primary measures will be membership level (by member institutions and individual participation) and financial income from professional development. Look at both retention and recruitment due to professional development activities. Possible measures can include new members as a result of professional development program attendance, non-member attendance and percentage of members taking advantage of professional development programs.

OVERALL GOAL: Sustain current level of professional development activity and increase over time. Activity should exceed the base-line measure of activities provided when function was all-volunteer driven.

2. Enhance NACAS' position as the premier association for auxiliary services professionals.

a. Place greater emphasis and resources on marketing. *Board will decide in 2006 on hiring a marketing manager, partnering with another organization, or outsourcing the marketing function.*

b. Develop a brand and broadly implement its use. *Select a consulting firm to assist with branding in 2006. Include branding questions in a yearly survey starting in 2007. Assemble information about NACAS for business partners and provide a webcast program for business partners by 2007.*

c. Consider changing the name or adding a tag line to clarify what NACAS is about. *Branding Committee will develop a tag line for NACAS that will be implemented in 2007. The NACAS Board will consider whether NACAS should expand into an international association by 2009, and will consider a change in the name by 2010.*

d. Develop activities that enhance the image of both NACAS and auxiliary services professionals. *Every two years (2007, 2009, 2011, 2013, 2015) NACAS will act as a convener of multiple associations on a critical topic.*

NACAS staff will make a concerted effort to attend and be visible at other association activities.

e. Confirm that our activities meet the diverse needs of our members. *Beginning in 2007, NACAS will conduct an annual member survey that seeks feedback on members' training needs, the quality and value of NACAS programs, member perspectives about the NACAS brand, the usability of the web site, and other issues.*

MEASURES: Primary measures will be membership retention and growth, enrollment in professional development programs, and member feedback on quality and value of NACAS programs and branding.

OVERALL GOAL: High level of satisfaction with all NACAS programs, high level of recognition of NACAS leading to increased membership to 1500 by 2015.

3. Build and diversify the membership.

a. Develop a plan for recruitment and retention. *Systems will be in place by 2007 to study benchmarking data, assess annual member survey feedback, and analyze NACAS in terms of types of institutions and leadership demographics. An annual target plan for recruitment and retention will be developed starting in 2008.*

b. Increase involvement with under-represented institutions and members. *Assessment and planning will be in place by 2008.*

c. Develop a multi-layered approach to membership growth. *By 2007, NACAS will develop a set of questions for member institutions to use to internally assess their organization regarding current and potential member representatives. NACAS will begin sending its magazine to Vice-Presidents for Business Affairs at member institutions in 2006. A plan for focusing on younger professionals will be in place by 2009.*

d. Embrace a wider range of business partner organizations. *The Business Partners Committee will clarify how NACAS will engage business partners as partners in 2006, and will establish yearly goals for expanding the number of business partners beginning in 2007.*

MEASURES: Number of institutional members, demographics of member representatives and leaders, and number of business partners.

OVERALL GOALS: 5% growth per year in member institutions, resulting in 1500 by 2015. 5 % growth in business partners resulting in 285 by 2015.

4. **Generate and manage financial resources to accomplish goals.**

   a. Develop a financial plan that provides fiscal stability for the association. *Staff will develop a proposal by 2007. Board will review and approve a financial plan for expanding reserves in 2007.*

   b. Develop financial goals and resources necessary for NACAS to accomplish its national and regional goals. *Utilizing the budget template, the Board will review the financial needs for the Strategic Plan initiatives in 2007, 2008, 2009, 2010, and 2011.*

   c. Develop a long-term plan for NACAS facilities. *The Board will establish a study group in 2008 to consider the long-term issues of location of NACAS' headquarters and facilities to support the organization by 2009.*

   MEASURES: These actions will be measured as either completed or not completed based upon the budget and the ability to implement strategic and tactical goals and objectives.

   OVERALL GOALS: 100% completion of these action items.

5. **Improve internal operations to fulfill the organization's mission, achieve goals, and enhance management.**

   a. Use new technology to create a more global organization. *Fully utilize the MIS system and optimize the use of internet technology. Include questions about web quality, timeliness of information, and navigability in annual member survey.*

   b. Design and implement a strategic planning management system. *This system should align the goals and budget processes with the strategic plan on an annual basis. Implement the strategic goal setting, assessment, and budget review process initially by 2006. By 2007establish a strategic score card to identify and assess strategic and operational measures. Board will evaluate and critique the implementation of the strategic plan in 2008.*

   c. Model sustainability concepts. *Encourage sustainability efforts both within the association and within auxiliary services.*

   d. Coordinate efforts to regularly and systematically assess member and auxiliary service needs and expectations. *Board will review the design and implementation of an annual comprehensive review system by 2007.*

   MEASURES: Responses on surveys regarding web site. Most actions will be measured as either completed or not completed. Report on sustainability efforts

within the association and include campus efforts in the Journal, on the website and elsewhere.

OVERALL GOALS: NACAS will receive high evaluations from members regarding the quality and usefulness of its web site. Board will find the MIS system to be an indispensable resource. The association and higher education will be graded successful in sustainability efforts. Performance measures will be routinely collected and assessed and the strategic system enhanced.

6. Provide support to regions.

a. Enhance the professional development opportunities in the regions. *Develop a catalog of program offerings that draws nationally from regional programs and that ensures programs are offered in all regions by 2007.*

b. Increase participation in the regional conferences and workshops around those conferences. *Link regional conferences and workshop to the branding initiative and link to the NACAS web site. Work with business partners on regional and national programming and review progress in 2009.*

c. Enhance the regions by providing greater access to future leadership and provide programs to educate and support regional leadership. *Establish a Region/Leadership Building Task Force in 2006 to benchmark other associations, identify best practices, link with the Career Center, and develop further recommendations for re-aligning regions based on size and member activity.*

MEASURES: Completing the tasks in this area. Feedback from annual member survey on questions that relate to NACAS regions. Regions will use the strategic planning assessment tools to plan and assess their own actions.

OVERALL GOAL: NACAS Regions are perceived by members as a vital and value-added component of the organization.

7. Strengthen the NACAS Educational Foundation to enable the funding of programs and services designed to enhance the auxiliary services profession.

a. Fund programs that will enhance the future of auxiliary services and NACAS. *Present the new Strategic Plan to the Foundation in 2006 and engage in discussion about aligning Foundation goals and the NACAS strategic plan.*

b. Continue to encourage business partners and members to contribute to the Foundation. *Encourage institutional members to give total gifts with a target of $15,000 per year. Approach business partners with specific funding proposals to underwrite the future of the industry and the association.*

MEASURES: Number of people making contributions, amount of contributions, number of discussions with business partners, and level of support from business partners.

OVERALL GOALS: $40,000 net per year in contributions to the Foundation for 2006 through 2010.

The NACAS Strategic Planning Management System

The strategic plan is a process resulting in a plan of action that envisions a realistic future, establishes goals that efficiently and effectively move toward that future, sets measures to assess accomplishments, and allows for course corrections to achieve that future. The plan also serves as a systematic, management tool for problem solving, market planning, product development and preparing business plans. The goal is to integrate all aspects of the business's activities in a mutually supportive system.

The process is overseen by the Strategic Planning Committee, chaired by the President-elect with ultimate responsibility with the NACAS Board of Directors. The Executive Director and staff, working with the Committee Chair Council, chaired by the Vice President of the Board, focuses on the delivery, assessment and planning of tactical formulation, delivery and assessment of the goals and objectives. This process should include:

July-August 2006 (Summer Board Meeting)

1. Board approves new association Strategic Plan!!!
2. Committee chairs and staff report on progress toward 2006 plan goals.
3. Board assesses past year's progress toward goals.
4. The Strategic Planning Committee reviews the strategic plan for significant changes that might affect the association's Strategic Plan. This should be simple the first year since the plan is new! The Strategic Planning Committee recommends changes in the plan to the Board.
5. Board accepts or modifies the Strategic Planning Committee's recommendations if needed…should be simple since plan is new!
6. Board uses NEW association Strategic Plan to develop guidelines for new (2007) strategic goal development by committees and staff. Guidelines provided to committees at Fall Leadership Conference and to staff when appropriate.

Fall 2006 Conference Leadership Meeting (preliminary work is done with staff and committees prior to the Conference):

1. Committees and staff report progress toward fulfillment of 2006 plan strategic goals using Matrix.

2. Committees and staff receive guidelines from the Board regarding new directions or changes based on NEW Association Strategic Plan for the 2007+ strategic goals.

3. Committees and staff begin to build/revise NEW strategic goals for next 12-24 months (2007+) and submit a *draft Strategic Goal Report Form (matrix)* with:
    a. Strategic goals, objectives, quantitative targets, measures, responsibilities, deadlines, budgets and resource needs.
    b. Work continues via conference call if not completed at Fall Leadership Conference.
    c. Completed 2007 *Strategic Goal Report Form (matrix)* due to Board no later than January 15, 2007.
    d. Begin identifying 2008 new programs for budget funding or old programs for elimination or reduction.

February 2007 Board Meeting:
1. Committee chairs and staff report progress toward 2006 strategic goals using Matrix.
2. Board reviews 2007+ NEW strategic goals submitted by committees and edits, reaffirms or re-aligns based upon strategic plan and any new developments.

February 2007 Leadership Meeting:
1. Committee Chairs and staff make final report progress toward 2006 strategic goals using Matrix.
2. Board delivers *approved* 2007+ *Strategic Goal Report Form (matrix)* to committees or collaborates on revisions.
3. Committee Chairs discuss and begin to implement 2007 strategic goals and objectives.
4. Committee Chairs identify opportunities to collaborate with each other.
5. Committee Chairs identify any new or expanding programs for consideration in the 2008 budget or programs to be reduced or eliminated.
6. Regional Presidents and leaders discuss NACAS strategic goals and objectives and relate them to regional needs, plans, goals and objectives.

Regional Meetings (spring/summer 2007):
1. Approved 2007 strategic goals matrix shared with regions.
2. Ideas for 2008 strategic goals collected.
3. Regional Boards and members comment on the NACAS strategic goals and share their own strategic goals with NACAS staff and leaders.

May 2007 Finance Meeting:

1. Finance Committee reviews progress toward 2007 strategic goals.
2. Finance Committee meets to build budget based upon association Strategic Plan, February Board meeting information, approved 2007 strategic goals and in anticipation of 2008 strategic goals.

July-August 2007 (Summer Board Meeting):

1. Committee chairs and staff report on progress toward 2007 strategic goals.
3. Board assesses past year's progress toward goals.
4. The Strategic Planning Committee reviews the Strategic Plan for significant changes that might affect the association and makes recommendations to the Board.
5. Board accepts or modifies the Strategic Planning Committee's recommendations.
6. Board uses association Strategic Plan to develop guidelines for 2008 strategic goal development by committees at Fall Leadership Conference and to staff when appropriate.

REPEAT…

Strategic Planning Task Force (2006)

These persons worked tirelessly to make this a living document that will provide lasting benefit to NACAS and higher education. Special thanks also go to the national and regional leaders who made many contributions as well as to the membership who commented on the present and future of the association through numerous Town Hall meetings, surveys and email comments.

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