



STRATEGIC PLAN
2010 – 2014

July, 2010

INTRODUCTION

NACAS has the opportunity to maintain and build on several significant strategic initiatives while introducing 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 the NACAS Regions, and continuing to foster the symbiotic relationship with our Business Partners. New initiatives will include developing and implementing a certification program, enhancing recruitment and retention of members, exploring the potential for developing an academic track for future auxiliary service leaders and implementing a standing technology committee charged with developing dynamic goals and objectives. To accomplish these goals, NACAS will utilize a system of measurable targets and measuring actions.

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 nine strategic areas.

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

- a. Continue to develop and refine professional development programs based on NACAS core competencies and contemporary training needs of our profession.
- b. Continue to refine curriculum and expand offerings for institutes.
- c. Encourage institutional graduate programs to develop specific courses, programs and “tracks” for future auxiliary leaders.
- d. Identify new delivery methods and technologies to be employed in delivering professional development programs such as blended learning, podcasts, etc.

2. Continue to enhance NACAS’ position as the premier association for auxiliary services professionals.

- a. Place greater emphasis and resources on marketing.
- b. Develop activities that enhance the image of both NACAS and auxiliary services professionals.
- c. Analyze current methods and explore new activities that meet the diverse needs of our members and non-members.

3. Build and diversify the membership.

- a. Annually review and revise, if needed, plans for recruitment and retention; ensure member database has the correct point of contact.
- b. Increase involvement with under-represented institutions, members, and business partners, including emerging professionals, students, women, minorities and minority-owned businesses.
- c. Develop a multi-layered approach to membership growth.
- d. Embrace a wider range of business partner organizations.
- e. Enhance cross programming with other associations to reach more nonmembers.
- f. Coordinate efforts to regularly and systematically assess member and auxiliary service needs and expectations.

4. Generate and manage financial resources to accomplish goals.

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

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

- a. Encourage effective and efficient use of staff and staff functions.
- b. Develop succession planning guidelines for NACAS Board and employees.

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. Support the regions through the development of a leadership/volunteer identification database and development program.

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

- a. Continue to align Foundation fundraising goals to the NACAS strategic plan.
- b. Encourage business partners and members to contribute to the Foundation.
- c. Obtain 100% participation from Board members (NACAS and Education Foundation) and regional leaders donating to the Foundation.
- d. Increase awareness of the Foundation – what it does, how it benefits the association, the membership and higher education.
- e. Develop, implement and maintain an active/dynamic marketing plan.
- f. Offer multiple opportunities for giving.

8. Develop and implement an industry standard certification program for campus service professionals.

- a. Develop a comprehensive program development, implementation and assessment timeline.
- b. Identify and complete all of the tasks necessary for the implementation of a certification program including the following areas: program design (test development, application, grandfathering); governance; policies and procedures; budget and fund raising; staffing; operations; and risk management.
- c. Market and re-market to the higher education community the benefits of a campus service certification program.
- d. Enroll prospective applicants for the campus service certification program.
- e. Grant certification to campus service professionals successfully completing the evaluation process.
- f. Develop the re-certification program for campus service professionals.
- g. Assess the effectiveness of the program in meeting objectives.

9. Maximize the use of technology to fulfill the strategic direction of the association.

- a. Develop a plan to bring NACAS technology up to university standards.
- b. Determine technology priorities based on members needs and wants.

ACTIONS, MEASURES, AND GOALS

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

- a. Continue to develop and refine professional development programs based on NACAS core competencies and contemporary training needs of our profession. *Review of core competencies will be driven by creation of certification program during 2010-11. Professional Development Committee will participate as requested, review, adapt and adopt revised competencies. Continue practice of participant evaluation of programs.*
- b. Continue to refine curriculum and expand offerings for institutes. *Review and revise curriculum for Institute for Managers in 2010-11. Launch Senior Leadership Forum in 2010.*
- c. Encourage institutional graduate programs to develop specific courses, programs and “tracks” for future auxiliary leaders. *Provide assistance to graduate programs wishing to develop curriculums that educate and prepare people to enter or advance in the auxiliary services profession.*
- d. Identify new delivery methods and technologies to be employed in delivering Professional Development programs such as blended learning, podcasts, etc. *Educate Professional Development Committee on trends for instructional delivery. Incorporate as appropriate in existing and new programs.*

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. Continue to Enhance NACAS’ position as the premier association for auxiliary services professionals.

- a. Place greater emphasis and resources on marketing.
- b. Develop activities that enhance the image of both NACAS and auxiliary services professionals. *Every two years (2011, 2013, 2015) NACAS will act as a convener of multiple associations on a critical topic. NACAS representatives will make a concerted effort to attend and be visible at other association activities.*

- c. Analyze current methods and explore new activities that meet the diverse needs of our members and non-members. *Conduct member surveys that seek 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. Conduct exit interviews with national Board and Committee chairs at the conclusion of their terms.

OVERALL GOAL: High level of satisfaction with all NACAS programs, high level of recognition of NACAS leading to increased membership to 1,500 by 2015.

3. Build and diversify the membership.

- a. Annually review and revise, if needed, plans for recruitment and retention; ensure member database has the correct point of contact. *Systems will remain in place to study benchmarking data, assess annual member survey feedback, and analyze NACAS in terms of types of institutions and leadership demographics. Each point of contact at the National Office will be used for requesting updated membership updates. This is an on-going effort by the Membership Committee and the National Office.*
- b. Increase involvement with under-represented institutions and members. *This is an on-going effort by the Membership Committee and the National Office, working with the Social Responsibility Task Force and Marketing Task Force in this effort.*
- c. Develop a multi-layered approach to membership growth. *Advertise to new members for NACAS in both publications and at conferences of other related CHEMA organizations. NACAS will also market the membership benefits available to all interested individuals at member institutions.*
- d. Embrace a wider range of business partner organizations. *Utilize the NACAS database to target companies who work for our member institutions that are not members of NACAS. Coordinate efforts with each region to identify local companies who are not involved with NACAS at the national level.*
- e. Enhance cross programming with other associations to reach more nonmembers. *Work with the Professional Development Committee to offer programs of interest to non-members.*
- f. Coordinate efforts to regularly and systematically assess member and auxiliary service needs and expectations. *Prepare an electronic welcome page for new members that will include a welcome letter and a survey of what the member seeks/expects from NACAS, and offering a call from the Membership Committee or regional board. This will provide new institutions with a point of contact early on where they can send any questions or concerns, and maintain a current record*

of member needs/expectations. This survey can also be sent to current members to gather that information. Subsequently, send survey out annually (possibly December) to keep current with member expectations/member contact information.

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

OVERALL GOALS: Work to maintain our current membership numbers and a targeted increase of 5% per year through 2014.

4. Generate and manage financial resources to accomplish goals.

- a. Maintain a financial plan that provides fiscal stability for the association and the Education Foundation. *Board will review and approve short and long-term financial plans, and establish goals for expanding reserves in 2011.*
- b. Maintain financial goals and resources necessary for NACAS to accomplish its national and regional goals. *Utilizing the budget template, the Board will annually review the financial needs for the Strategic Plan initiatives.*
- c. Maintain a long-term plan for NACAS facilities. *The Board will establish a study group in 2011 to consider the long-term issues of location of NACAS' headquarters and facilities to support the organization.*

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. Continue to improve internal operations to fulfill the organization's mission, achieve goals, and enhance management.

- a. Encourage effective and efficient use of staff and staff functions.
 1. *Continue an annual staff review process.*
 2. *Continue staff professional development through related association memberships and events. All staff should attend a minimum of 2 educational sessions at the NACAS annual conference to learn more about the industry.*
 3. *Systematic examination of the organization for discussion with the Board (outsourcing, etc.).*
 4. *CEO to annually review alternatives with the NACAS Board for providing adequate staffing for Board identified needs.*

- b. Develop succession planning guidelines for NACAS Board and employees.
Define roles and expectations.

MEASURES: Maintain focus on staff professional development. Adequately plan for changes in key positions.

OVERALL GOALS: Seamless transition during changes in paid and volunteer leadership.

6. Provide support to regions.

- a. Enhance the professional development opportunities in the regions.
Provide information from the Body of Knowledge/Core Competencies developed by the Certification Task Force for regional programs. Utilize blogs, profiles and community discussions to generate ideas and resources.
- b. Increase participation in the regional conferences and workshops around those conferences. *Increase marketing efforts to business partners to attend regional events. Share successful programming ideas between regional planning teams. Have marketing material about each event available at least 3-4 months in advance of the program. Encourage a rotation of conference locations around the entire region to draw upon new “local” attendees. Offer scholarships for attendance when possible.*
- c. Support the regions through the development of a leadership/volunteer identification database and development program. *The National Office, working with the Membership and Professional Development committees should develop active recruitment tools that target current members. These tools could include committee/leadership “menus”, distributed at each regional and national conference, which would allow members to volunteer for assignments of their choice. The process should also be available online. Develop an online/interactive session for new volunteer/committee members that helps them learn their roles and explains the association processes. Benchmark other associations and develop best practices for leadership/volunteer recruitment and development.*
- d. Recognize and provide support to statewide groups within the regions. *When possible, have staff attend statewide meetings and provide information from the national perspective.*

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 Education Foundation to enable the funding of programs and services designed to enhance the auxiliary services profession.

- a. Continue to align Foundation fundraising goals to the NACAS strategic plan. *Develop short and long-term goals and methods for analysis and appropriate review.*
- b. Continue to encourage business partners and members to contribute to the Foundation. *Encourage institutional members to give gifts with a target of total member giving of \$15,000 per year. Approach business partners with specific funding proposals to underwrite the future of the industry and the association.*
- c. Obtain 100% participation from Board members (NACAS and Education Foundation) and regional leaders donating to the Foundation. *Continue to work with regional leadership to encourage giving.*
- d. Increase awareness of the Foundation – what it does, how it benefits the association, the membership and higher education. *Continue to educate the membership on the purpose of the Foundation. Maintain a publication schedule of at least one Foundation article in each issue of College Services.*
- e. Develop, implement and maintain an active/dynamic marketing plan. *Regularly review marketing ideas and programs which promote the Foundation.*
- f. Offer multiple opportunities for giving. *Continue to develop new, convenient ways for individuals and business partners to give.*

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

OVERALL GOALS: \$50,000 per year contributed to Foundation reserves.

8. Develop and implement an industry standard certification program for campus service professionals.

- a. Develop a comprehensive program development, implementation and assessment timeline.
- b. Identify and complete all of the tasks necessary for the implementation of a certification program including the following areas: program design (test development, application, grandfathering); governance; policies and procedures; budget and fund raising; staffing; operations; and risk management.
- c. Market and re-market to the higher education community the benefits of a campus service certification program.
- d. Enroll prospective applicants for the campus service certification program.

- e. Grant certification to campus service professionals successfully completing the evaluation process.
- f. Develop the re-certification program for campus service professionals.
- g. Assess the effectiveness of the program in meeting objectives.

MEASURES:

- a. Develop the work analysis for a certification program.
Complete a work analysis, using standards comparable to the best practices for this activity, for the certification program by May, 2010. As a part of that process set policies in place to keep this analysis current on an on-going basis.
- b. Conduct a feasibility analysis among stakeholder groups for this program.
By May, 2010 conduct a feasibility analysis, using standards comparable to the best practices for this activity, of major higher education stakeholders with concern for campus services standards. Provide a report to the Board of Director's based upon the findings NLT August, 2010. Make a "go/no go" decision.
- c. Develop the logistics needed to implement this program.
As outlined by the Certification Task Force, complete all logistical activities necessary to implement an industry standard certification program using timelines set in conjunction with the NACAS Board of Directors and with the help of the NACAS Education Foundation by August 2010.
- d. Establish the certification governing board by fall 2010.
- e. Develop the testing requirement for a certification program beginning January 2011.
Hire a consulting group to assist with this process by December, 2010. Complete construction of a certification examination, using standards comparable to the best practices for this activity, by June 1, 2011.
- f. Enroll prospective applicants for the campus service certification program.
Based upon benchmarks determined by the Board of Directors, complete logistical requirements to the point where applicants can be enrolled in the certification program by late September 2011.
- g. Grant certification to groups of campus service professionals.
Complete all requirements to enable campus services professionals to be tested for the certification designation. Prepare for the first certification designation to be awarded by December, 2011.
- h. Develop the re-certification program for campus service professionals.
Have in place by the award of the first designation, the requirements for re-certification, if applicable by August 2011.

- i. Market and re-market to the higher education community the benefits of a campus service certification program.
By October, 2010 present to the Certification Task Force, Education Foundation and the Board the plans for the certification program marketing plan.
- j. Establish a schedule for the regular review of the certification program on a yearly basis.

OVERALL GOALS: Successful implementation of the Certification Program. By 2016 be producing 100 new certificants per year with renewals of 50 per year. Determine appropriate concrete goals for participation.

9. Maximize the use of technology to fulfill the strategic direction of the association.

- a. Develop a plan to bring NACAS technology up to university standards.
Establish a Technology Task Force to research and provide a plan of action for a technology structure and supporting resources that will improve the efficiency, effectiveness and quality of NACAS relative to the strategic and operational use of technology.
- b. Determine technology priorities based on university and other association best practices.
Develop a multi-year technology plan to be reviewed annually.

MEASURES: Responses on surveys regarding functionality and appearance of web site, conference registration, deployment of Professional Development opportunities, etc. Completion of specific technology plan tasks.

OVERALL GOALS: NACAS will receive high evaluations from members regarding the quality and usefulness of its web site and other technology driven resources. Board will find the MIS system to be an indispensable resource.

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 2010 (Summer Board Meeting)

1. Committee chairs and staff report on progress toward 2010 plan goals.
2. Board assesses past year's progress toward goals.
3. Board accepts or modifies the Strategic Planning Committee's recommendations.
4. Board approves updated Strategic Plan!
5. Board uses updated Strategic Plan to develop guidelines for new (2011) strategic goal development by committees and staff. Guidelines provided to committees at Fall Leadership Conference and to staff when appropriate.

Fall 2010 Conference Leadership Meeting (preliminary work is done with staff and committees prior to the Conference):

1. Committees and staff report progress toward fulfillment of existing strategic goals using Matrix.
2. Committees and staff receive guidelines from the Board regarding new directions or changes based on updated Strategic Plan for the 2011+ strategic goals.
3. Committees and staff begin to build/revise new strategic goals for next 12-24 months (2011+) 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 2011 Strategic Goal Report Form (matrix) due to Board no later than January 15, 2011.
 - d. Begin identifying 2012 new programs for budget funding or old programs for elimination or reduction.

March 2011 Leadership Meeting:

1. Committee Chairs discuss and begin to implement 2011 strategic goals and objectives.
2. Committee Chairs identify opportunities to collaborate with each other.
3. Committee Chairs identify any new or expanding programs for consideration in the 2012 budget or programs to be reduced or eliminated.
4. Regional Presidents and leaders discuss NACAS strategic goals and objectives and relate them to regional needs, plans, goals and objectives.

March 2011 Board Meeting:

1. Committee chairs and staff report progress toward 2011 strategic goals using Matrix.
2. Board reviews 2011 strategic goals and edits, reaffirms or re-aligns based upon strategic plan and any new developments.

Regional Meetings (spring/summer 2011):

1. Approved 2011 strategic goals matrix shared with regions.
2. Ideas for 2012 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 2011 Finance Meeting:

1. Finance Committee reviews progress toward 2011 strategic goals.
2. Finance Committee meets to build budget based upon association Strategic Plan, February Board meeting information, approved 2011 strategic goals and in anticipation of 2012 strategic goals.

July-August 2011 (Summer Board Meeting):

1. Committee chairs and staff report on progress toward 2011 strategic goals.
2. Board assesses past year's progress toward goals.
3. The Strategic Planning Committee reviews the Strategic Plan for significant changes that might affect the association and makes recommendations to the Board.
4. Board accepts or modifies the Strategic Planning Committee's recommendations.
5. Board uses association Strategic Plan to develop guidelines for 2012 strategic goal development by committees at Fall Leadership Conference and to staff when appropriate.

REPEAT...