NACAS Strategic Plan
Effective: 2018-2021
NACAS Strategic Long-Range Plan

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Adapted from original by:

Jean S. Frankel - President and CEO
Ideas for Action, LLC
www.ideasforactionllc.com

Overview

This strategic plan describes a desired vision and what will be essential to achieving that vision. It is grounded in core ideology and driven by an envisioned future that realizes the full potential of NACAS’s ability to support its stakeholders. NACAS’s commitments are articulated in goals that declare the outcomes or attributes the association intends to achieve. Objectives represent key metrics affecting NACAS’s ability to achieve the goal and articulate the direction in which these issues must be moved.

NACAS will not be able to be all things to all people, but it must be different things to different people as the plan evolves to meet the needs of a constantly changing community and environment. Therefore, underlying this plan is the adoption of an ongoing process of planning and thinking strategically, designed to ensure relevance of direction and action over time.

Ongoing re-evaluation. Strategic planning for NACAS should become the methodology for the association’s operations. If it is successful, this process will not have yielded a plan to be placed on the shelf, but will have served as a catalyst for the “process of planning strategically,” at all times and at all levels throughout the association. In order to achieve its vision, NACAS must not look at strategic long-range planning as a one-time project that produces a milestone document of its best thinking at the moment. Instead, NACAS must adopt strategic planning as an operational philosophy of ongoing re-evaluation of the critical knowledge bases that form the framework of its world, including:
Core Ideology

Core ideology describes an association’s consistent identity that transcends all changes related to its relevant environment. Core ideology consists of two notions: core purpose – the association’s reason for being – and core values – essential and enduring principles that guide an association.

Our Core Purpose

To advance campus experiences that enrich the quality of life for students, and that provide sustainable institutional resources to support student success and the academic mission of our members’ institutions.

Our Core Promises:
These statements communicate the multi-layered impact that NACAS has on students, members, business partners, higher education institutions, and the entire trade.

Solutions. To enrich experiences and quality of life for students.
Resources. To inform our members’ decisions on campus transformation.
Counsel. To build our Business Partners’ brands within campus communities.
Innovation. To improve the financial health of higher education institutions.
Leadership. To advance and sustain campus environments worldwide.

Our Core Values
• Integrity - We are committed as an association and a profession to the highest standards of managing in a professional and trustworthy manner, remembering that character is what you do when no one is watching.
• **Leadership**: We inspire a compelling vision of the future and a sense of innovation among our members by providing the resources that enable them to anticipate and satisfy the needs of the institutions they serve. We encourage them to embrace imaginative and unique solutions, to think outside the box, and to seek creative solutions to challenges.

• **Adaptability** – We are dynamically responsive to the environment; courageous: having strength in the presence of uncertainty.

• **Excellence** – We strive to provide quality service, innovation and value. We focus on operational quality, service, innovation and value in a competitive environment; responsiveness to service and product needs of all constituencies.

• **Inclusiveness** – We embrace diversity and professionals at all levels, from every walk of life, treating every member as special and included, no matter how large the association grows. We also recognize and respect the diversity of our members’ institutions, whether large or small, public or private. We are committed to ensuring all members have access to all levels and resources of the association.

• **Respect** - We value all opinions, backgrounds, and perspectives within the higher education community. We are inclusive and value the diversity of our stakeholders.

• **Community** - We value collaboration and community, and the social connections and engagement gained through member interactions and connections.

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**Envisioned Future**

*Envisioned future* conveys a concrete, but yet unrealized, vision for the association. It consists of a **big goal** – a clear and compelling catalyst that serves as a focal point for effort – and a **vivid description** – vibrant and engaging descriptions of what it will be like to achieve the big audacious goal.

**Our Big Goal**

- Auxiliary services will be integral to higher education as it seeks to enhance the campus experience and contribute to institutional efforts on controlling the costs of higher education.

**Our Vivid Descriptions**

*Auxiliary Profession*

- Auxiliary will be seen as the platform that connects campuses with businesses to innovate, shape, and create the institution of the future. Auxiliary and business services will lead institutions in shaping the quality of campus life, increasing awareness of how the role of auxiliary services supports the mission of higher
education to shape enriching student experiences and develop well-rounded citizens.

• Auxiliary service professionals will be included in high stake conversations at all levels of the institutions they belong to as the entrepreneurial thinkers and do-ers. The "chief auxiliary services officer" will be a recognized position that is clearly understood throughout higher education.

• Auxiliary services professionals will positively impact the costs of education and improve the value proposition to students as well as the individual student experience.

• Auxiliary services will be the sought-out pioneers of creating the environments, services, and solutions that support higher education and enrich the student experience. Auxiliary services will be seen as the premier campus entrepreneur, viewed as an invaluable resource to our academic partners to solve unique and common challenges.

**Institutional Impact**

• Auxiliary will be the provider of campus services that help students' growth as individuals –facilitating the development of life skills, and the journey to independence. Students will select their college/university based on the auxiliary services and experiences provided at that college/university.

• NACAS members’ auxiliary departments will be recognized by students as a key part of their educational experience. Through auxiliary excellence, students at NACAS member institutions will experience greater satisfaction, which will improve recruitment and retention rates.

• Through auxiliaries, NACAS member institutions will experience improved and increased financial performance by improving efficiencies in operations and sourcing cost-effective solutions from NACAS business partners.

• Auxiliary services will partner with academics to provide a complete, successful experience for the student.

**Business Partnerships**

• NACAS will be the hub where the worlds of campus services and cutting-edge business concepts come together to create innovative solutions in support of institutional goals and objectives. Business partners will seek out NACAS as a means of connecting with our institutions, auxiliary leaders and representation NACAS will connect campus with business, creating the ultimate student experience.

• NACAS will facilitate member and business partner relationships, to promote
collaboration and the continuous improvement of sustainable services to campuses. NACAS will bring higher education professionals and businesses together in a collaborative way which benefits both parties and ultimately, those they are committed to serving – the students.

• NACAS will be the vehicle for our business partners to discuss and share the tools, technologies and techniques that support us in the advancement of our campuses. NACAS will continually share new business and funding models that influence how auxiliary services can alleviate and overcome the financial burdens experienced by institutions, as well as students. NACAS will provide examples of how strategic partnerships and innovative business models can help schools keep a more robust academic portfolio as auxiliaries provide healthy revenue back to the school to support these programs.

The Association

• NACAS will be the recognized as the premier resource for auxiliary services professionals and the institutions they serve. NACAS will be the premier resource of knowledge, leadership, and professional development opportunities in our industry, adding value to our member partnerships, institutional directives, and student experiences. NACAS will be widely recognized as the one-stop-shop resource for the multiple facets of campus services.

• NACAS will be sought out by higher education business and auxiliary leaders as the preeminent resource for best practices. NACAS will be the premiere resource for future trends and demographic research. We will help professionals in benchmarking. With our knowledge, commitment to relationships and understanding of best practices, we will serve as a bridge for the campus community.

• NACAS members will provide a platform for members to share innovations and be perceived as leaders in their respective areas of responsibility. NACAS will foster the development of future leaders through CASP, networking, and other professional development opportunities. NACAS will improve the skill sets of rising auxiliary service leaders by training them to think critically, stay abreast of the latest technologies and services, act ethically, and stay creative.

• NACAS will help professionals by providing solutions for challenges that arise in the fast-paced and dynamic environment of higher education. NACAS will foster the development of experts that are the source of innovative campus solutions. NACAS members will be perceived as innovators and leaders in their respective areas of responsibility.

• CASP will be a sought-after credential and will be recognized as a proven symbol of
experts. This universally accepted credentialing process will demonstrate a body of knowledge, ethical standards and forward thinking that will enable auxiliary service professionals to be recognized as integral members of the campus community. NACAS memberships will reflect trends of growth retention. Events will benefit from strong member participation. We will provide an impactful value proposition for our institutions, advancing campus solutions and furthering the missions of our member institutions.

- NACAS will broadly define and standardize auxiliary services as a recognized and well understood term.

Assumptions About the Relevant Future

**Assumption** statements will help NACAS purposefully update its strategic plan each year by taking a critical look at the environment affecting NACAS members and institutions, including both continuations of current trends and emerging uncertainties. An annual review of these statements will be an appropriate method of determining and ensuring the ongoing relevance of the strategic plan goals and priorities.

**DEMOGRAPHIC**

1. An increasing population of non-traditional students will impact the traditional student/campus experience and may have an impact on campus services provided.

2. The rise of international students will impact enrollment, and the politics happening in our country now may have an impact on the student population and climate on campuses.

3. Consumer trends and online shopping accessibility will change the brick and mortar business model.

4. The need for all people to find a sense of belonging and community will continue to change and influence business models going forward.

5. The growth of online learners will force campus auxiliary professionals to change their campus services to meet new expectations. Retention will be prioritized due to unique needs of varying demographics.

**LEGISLATIVE AND REGULATION**

1. Wage increases at all levels will impact direct costs to operations and college.

2. Implementation of policies such as transgender or gender neutral restrooms will
become more complex, especially as a new administration in Washington reviews Obama-era mandates. Major unknown is the new presidential administration, new appointment of Secretary of Education, not sure where the future regulations are headed.

3. As state, provincial and federal governments provide more regulations to specific areas of higher education, the interpretation and implementation may become more specialized. For example, auxiliaries may be impacted by the need for additional resources to manage those regulations and hire/onboard more specialized professionals and provide ongoing training for these professionals (e.g. ADA, title IX).

4. Interpretation and implementation of regulation will continue to become more specialized.

5. Legislative mandates may not consider the loss of revenue or the implementation costs. Therefore, unfunded mandates may continue to increase cost. Environmental, Safety mandates – will require funding to meet the regulations.

**ECONOMIC CLIMATE**

1. The concept of lowering the cost of education will impact auxiliary businesses. It may be in the form of free tuition, bookstore regulations, or another format, and it will vary based on school type (community college, public research, etc.) and state/federal levels. It also may require a shift in some cases from revenue generation to cost savings to the student.

2. When it comes to investing capital, ROI will be looked at very closely to be sure of the investment. Entrepreneurial investing will require more immediate ROI. This is especially the case with student debt.

3. The living / learning model will be challenged as online learning becomes more accepted, because of costs.

4. Because of decreased funding to higher education, there will be an increased demand for the revenue from auxiliaries.

**NATURE OF HIGHER EDUCATION AND OUR PROFESSION**

1. The value of higher education will continue to be questioned, resulting in potential enrollment, retention, and completion reductions and a need for us to alter services with a focus on affordability. ROI on education will become increasingly more questioned. Student / family demand for services will continue to grow, while
funding and questions on why they are offered will continue to be criticized.

2. **Increased desire for distance learning will impact campus services and student interaction.**

3. **The market evolution of the course materials industry, transportation industry, and other industries will have a significant impact on current business models. Key factors include student/faculty preferences, affordability, and availability, as well as legislative changes.**

4. **There may be increased pressure from non-auxiliary stakeholders at the institution to redefine our profession.**

5. **Additional financial resources and personnel skills will be necessary for success as an auxiliary professional.**

6. **The future will be more metric driven requiring that benchmarking data is readily available, comparative and relevant.**

There is an increasing demand for campus-wide collaboration for greater impact on the student experience.

**SCIENCE AND TECHNOLOGY**

1. **Drive changes in services through investing in technology, but the challenge will be around resources and possibility of change.**

2. **Redistribution of personnel will remain unclear as technology evolves and impacts job duties/general services.**

3. **Changing consumer trends will mandate different business models to be successful. Declining bookstore business will need to be made up in other areas.**

4. **Technology is adding competition - customers can get services or resources elsewhere through new forms.**

5. **Students rapid adaptation to technology will push auxiliaries to adapt more than the trend of technology itself.**

6. **Technology services in auxiliary may cause loss of the socialization aspect among students and their campus environment.**
Long Range Envisioned Future
Auxiliary services will be integral to higher education as they seek to enhance the campus experience and contribute to institutional efforts on controlling the costs of higher education.

NACAS Vision
NACAS inspires leadership and business partnership to enrich the campus experience.

NACAS Core Purpose and Mission
To advance campus experiences that enrich the quality of life for students, and that provide sustainable institutional resources to support student success and the academic mission of our members’ institutions.

2018–2021 Initiatives
In order to shift the envisioned future to a reality in the industry, NACAS has set three-year initiatives focused on brand and industry, programs and services, and membership.

NACAS has identified current and future challenges that face both NACAS as an organization (financial and organizational) and the auxiliary services industry (demographic, legislative, economic, technology, and the higher education landscape). These challenges have been considered in identifying the goals and objectives and the actions necessary to achieve them.

Key Performance Indicators (KPIs) will be used as an actionable scorecard that keeps NACAS’ strategy on track. KPIs are not the desired outcomes, but will be used to manage, control and achieve the desired outcomes outlined in each objective.

Brand & Industry Initiative

Goal: NACAS is recognized as a thought leader, trusted resource, and industry expert on auxiliary services in higher education.

Objectives:
1. Create knowledge of industry excellence through promotion of the NACAS award winners and scholarship recipients.

   Key Performance Indicators:
   • NACAS regions will highlight the national and region-specific award winners once a year through their online newsletter and in person at the regional conferences.
   • NACAS office will send a press release (and photos if available) to the recipient’s university’s PR/marketing department and the recipient’s direct supervisor.

   Group responsible: Awards Committee
2. Enhance NACAS brand recognition in Canada by growing Canadian institutional membership base by net 9% annually.
   **Key Performance Indicators:**
   - Canadian Committee to engage non-renewed members in their grace period twice/month until the institution renews or lapses membership.
   - Canadian Committee to introduce 2 non-member institutions each month to the staff liaisons.
   **Group responsible: Canadian Committee**

3. Through coverage in College Services, the Communication Services Committee will introduce industry leaders from related fields to the auxiliary services community.
   **Key Performance Indicators:**
   - Coverage of at least one organization or individual from a related field outside the NACAS community in each quarterly issue of College Services.
   - Through the use of developed tracking tools, CSC will ensure article will address the diverse needs, interests, and backgrounds of the NACAS community.
   **Group responsible: Communication Services Committee**

4. Have a minimum of 25 new business partners exhibit in the C3X Expo each year, ensuring growth of overall NACAS business partners.
   **Key Performance Indicators:**
   - Institutional Members of the Business Partner Advisory Group each provide four (4) business names and contacts that are not current NACAS business partners throughout the year.
   - NACAS Staff to pitch 100 non-member businesses to become part of NACAS.
   **Group responsible: Business Partner Advisory Group**

5. Enhance NACAS’ brand recognition by educating business partners on ways they can leverage their NACAS business partner membership to the higher education industry.
   **Key Performance Indicators:**
   - NACAS Business Partner Advisory Group to communicate once a year to all NACAS business partners providing them a NACAS business partner logo and boilerplate language to include when responding to RFPs to showcase their knowledge, involvement, and support of the auxiliary service industry.
   - NACAS Staff to work with a minimum of 2 business partners a year on a strategic communication sent out to non-member institutions who have a relationship with the business partner.
   **Group responsible: Business Partner Advisory Group**

6. Enhance the NACAS brand recognition as a thought leader and trusted resource by creating a roadmap for 2019-2021 that determines NACAS Research topics and NACAS standard documentation curation by October of 2018.
Key Performance Indicators:
- Research, organize, and vet documents shared by members in the NACAS Lounge by May 2018 in order to determine at least (3) general NACAS standard templates to create. This could be template RFPs for various services, professional or student employee handbooks, strategic plan templates, or benchmarking/metric training. These (3) standard documents shall be created and shared with the membership before the end of 2018.
- The remaining roadmap for research topics and NACAS documents to execute through 2021 will be determined by October 2018.
- Provide at least (1) full research report to the NACAS membership in 2018.
- The RAG will determine 1-2 research topics to study and execute between 2018 and 2019 by May 2018.

Group responsible: Research Advisory Group

7. Increase member affinity by providing NACAS Foundation sponsored activities that increase participation within the NACAS Community by a 5% growth year over year based on percentage of attendees.

Key Performance Indicators:
- Oversee a flip-a-coin event at each Region’s Conference and C3X annually with a 5% growth in number of beads sold year over year based on percentage of attendees.
- Plan, organize, and market a golf tournament at C3X 2019 that has 40 participants, providing at least $5,000 in revenue.
- Create an inclusive event at C3X 2019 that invites individuals from multiple affinity groups (e.g. donors, leadership, NACAS supporters) with minimum participation of 400 individuals.

Group responsible: NACAS Foundation

Programs & Services Initiative

Goal: To provide programs and services to meet the needs of the auxiliary professional.

Objectives:
1. Through use of technology and cultivation of programs and events at C3X, increase sustained attendee engagement with 30% of C3X attendees utilizing other NACAS resources by December 31, 2019.

Key Performance Indicators:
- Utilize data from app to increase usage of feedback/review by 10%
- Invite 25% of educational sessions presented at C3X to follow-up with additional/new information (e.g. project updates, impact/benefits of a project once completed) in other NACAS resources such as NACAS Research, NACAS Lounge, College Services, Webinars, Regional Conferences and next C3X.
• Implement a tool for attendees to set up appointments with business partners at C3X and have each committee member reach out to 25 individual attendees to encourage use of this feature.

*Group responsible: C3X Committees*

2. Engage a total of 20% of Canadian individual members through Canadian specific events and education opportunities related to ancillary services professionals.

*Key Performance Indicators:*

- Host On the Road professional development event between February and April at Canadian member institution.
- Host two professional development opportunities within the calendar year for NACAS members, either virtually or in-person.

*Group responsible: Canadian Committee*

3. Evaluate, re-envision, and recommend changes to the CASP program in order to continually focus on educating and validating knowledge gained and implement approved changes by December 31, 2020.

*Key Performance Indicators:*

- Align Commission with Professional Development initiatives by inviting 1 professional development committee representative to join all Certification Commission calls. Annually review the CASP content outline and adjust (if needed) to align with data validated by NACAS Research.
- Provide 1 Subject Matter Expert to the Professional Development Committee for each CASP subdomain to assist in alignment of online courses with CASP content outline.
- Explore, research, and document at least three alternatives that will result in long-term sustainability for the CASP program.

*Group responsible: Certification Commission*

4. Through coverage in College Services, the Communication Services Committee will communicate current trends in the auxiliary services industry.

*Key Performance Indicators:*

- Coverage of at least one cutting-edge development/program/concept per quarterly issue of College Services.
- Increase opportunities for shared authorship of content between business partners and NACAS members.
- Regularly promote College Services and calls for submissions/article pitches twice annually through email blasts and social media posts.

*Group responsible: Communication Services Committee*

5. Develop professional development learning opportunities that meet the current and future needs of the auxiliary professional through broad and diverse channels of professional development programs, with average satisfaction scores a minimum of 90%.
Key Performance Indicators:

• Each quarter, review post-event surveys from all online and in-person programs and implement content changes or additions based on the feedback.
• Using NACAS Research data, develop operational standards for leadership positions that can be used for professional development programs such as online courses, best practice guidelines, and the Leadership Series.

Group responsible: Professional Development Committee

6. Deliver a Central Connect & Exchange (CX) experience that provides interesting, diverse, and relevant educational & networking opportunities to auxiliary professionals and business partners, with attendance exceeding the 3-year average for the region.

Key Performance Indicators:

• Invite a representative from a member institution in the geographic region of the annual CX and a business partner representative on the CX planning committee annually.
• Partner with the NACAS Office to distribute mass marketing emails twice per month leading up to Central CX once registration opens. Emails will feature educational content, financial assistance availability, registration deadlines, and other important information.
• Ensure positive feedback received from both Business Partners and Delegates by reaching an average CSAT score of 90% for all Central CX educational programs, including the annual Central CX sessions and the Best of Central session at C3X.

Group responsible: NACAS Central

7. Increase NACAS East individual participation in NACAS events and programs by 5% over the three year average.

Key Performance Indicators:

• East Region will implement a minimum of 16 educational sessions at East CX annually.
• East Region will implement a minimum of 3 On the Road events per fiscal year.
• East Region, working with NACAS to identify webinar topics, will host two webinars per academic year.

Group responsible: NACAS East

8. Attract 225 institutional attendees to the South Regional Conference by 2020 to expose professionals to programs they need.

Key Performance Indicators:

• Reach a post-conference 90% CSAT for educational programs planned from both member and non-member schools in 2019 (for 2020 conference)
• Recruit 80% of educational session presenters from member schools and recruit 20% professional speakers to focus on critical topics by 2020

Group responsible: NACAS South

9. Create a culture of giving within the NACAS community that provides a minimum of $100,000 of funding annually to support NACAS programs.

Key Performance Indicators:
100% participation of giving among the NACAS and Foundation Boards annually.
Each NACAS Foundation Board member makes 25 fundraising contacts to association members annually (2-3 calls per month).
One NACAS Foundation email sent out each month communicating the Campaign, NACAS Foundation, and providing a link to donate.
Grow number of unique donors by 1% of the NACAS membership annually.

Group responsible: NACAS Foundation

Membership Initiative

Goal: Enhance the value of membership to increase retention, recruitment, inclusivity, and engagement.

Objectives:
1. Disseminate the maximum amount of available scholarship dollars per year as it relates to inclusive excellence.
   Key Performance Indicators:
   - Promote NACAS diversity initiatives, including the Mereese Ladson Scholarship, through dedicated email campaign to members in January, February, and March.
   - Solicit at least 5 nominations annually for the Mereese Ladson Scholarship.
   Group responsible: Awards Committee

2. Increase participation across multiple professional levels and departments of the institution by 20% to ensure a more sustainable membership base by C3X 2019.
   Key Performance Indicators:
   - Target marketing based on a reasonable distance from C3X location. Each committee member to call or email 10 institutions within this area to encourage attendance by multiple institutional attendees.
   - Create segmented marketing material on how to sell C3X to supervisor or other departments on campus, and during registration, identify institutional delegates with only one or two higher administration delegates, and contact 25% of them, encouraging them to register a younger professional or new auxiliary services hire for C3X.
   Group responsible: C3X Committees

3. Increase CASP applications by 50% and increase retention from an average of 55% to an annual retention of 80% by December 31, 2019.
   Key Performance Indicators:
   - Create policies that make applying for CASP more accessible and simplify the recertification activity tracking and approval process for both the CASP designees and NACAS Staff by May 2018.
   - NACAS Office send 1 email per quarter to each CASP with updated credit report and reminder of remaining activity credits needed.
• Create a policy for retired CASP designees by June 2018. Invite 2 retired CASPs annually to lead training or submit an article for the industry.

*Group responsible: Certification Commission*

4. Identify educational topics that will engage our current members and entice new members to join the Association. These topics will be aimed to enhance the value of membership to increase retention, recruitment, inclusivity, and engagement. Can be topics for conferences, virtual roundtables, webinars, College Services Magazine, regional newsletters, etc.

*Key Performance Indicators:*
- Survey the Membership Committee volunteers quarterly (February, May, August, November) to better understand the needs of our membership. The results will be summarized and shared with the Professional Development Committee and Regional leadership.
- Host two virtual learning opportunities per year related to improving engagement within NACAS. One webinar will focus on membership benefits and will take place in April, the other virtual roundtable will take place post-C3X and will seek ways that NACAS can enhance the membership throughout the following year.

*Group responsible: Membership Committee*

5. Engage new and rejoined NACAS members through a 12-month on-boarding process to build brand connection and impact new member retention rates.

*Key Performance Indicators:*
- Each committee member communicates with 9 new members quarterly, resulting in 93% new member retention
- Membership committee volunteers will serve as brand ambassadors through quarterly, non-transactional outreach. Assigning ambassadors and tracking outreach will take place on each monthly committee call.

*Group responsible: Membership Committee*

6. Increase the participation of individuals in professional development programs by 10% across all demographics (career level, school type, personal identities, etc.) annually, with 2019 as a base year for comparison.

*Key Performance Indicators:*
- Host at least 1 in-person and 3 online programs that are specifically targeted towards each career level (emerging professional, mid-level professional, and senior-level professional).
- Host at least 1 Virtual Roundtable or other platform that focuses on identifying needs and unique challenges of the following demographics: small schools/community colleges, women leaders, HBCUs, Canadian institutions, etc. A PD member will attend the roundtable to learn of these needs to plan future content.
- Develop a marketing strategy aimed towards segmented demographics whenever appropriate, and promote recorded webinars quarterly.

*Group responsible: Professional Development Committee*
7. Increase engagement of business partners year-round to retain at least a 90% business partner renewal rate and a 75% exhibiting renewal rate.
   **Key Performance Indicators:**
   - Host a pre-conference webinar to help business partners plan for C3X.
   - Have four (4) institutional advisory group members attend the C3X exhibitor meeting each conference to listen to business partner feedback.
   - Send quarterly emails from the Business Partner Advisory Group to all business partner members communicating tools and resources available to them through NACAS.
   
   **Group responsible: Business Partner Advisory Group**

8. Increase comprehensive demographic information of the NACAS membership by at least 20% every year (starting from 97 active institutional profiles in 2018).
   **Key Performance Indicators:**
   - Each advisory group member will commit to getting 5 institutions to complete their membership profile every year, resulting in 25 additional institutions with at least 1 contact with completed profile information.
   - Each advisory group member will commit to the same metric as above for years 2019 and 2020. This should result in at least 32 net new institutions with complete demographic profile information each year. By 2020, there shall be at least 194 institutions with complete demographic profile information in the NACAS Marketplace.
   - By November of 2018, the Research Advisory Group will determine if additional member information fields (3 at most) are needed to expand the member repository/directory (other than number of years in the industry, responsibilities in auxiliary services, professional level, and annual budget and revenue ranges)

   **Group responsible: Research Advisory Group**

9. Support NACAS recruitment and retention initiatives through the development of a financial and investment policy that meets annual operating needs and seeks to grow reserve funds of the region, to provide financial assistance back to its members through CASP exam fee reimbursement, conference attendance grants and membership dues support.
   **Key Performance Indicators:**
   - Evaluate regional expenditure history and current budget to determine what should be maintained in liquid funds and what can be invested long-term.
   - Establish a regional endowment with the NACAS Foundation to support the development, recruitment, and retention initiatives of the NACAS Central Region.
   - Collaborate with the NACAS Office member services team to provide timely support for recruitment and retention outreach opportunities.

   **Group responsible: NACAS Central**

10. NACAS East will achieve a net 3% membership growth.
    **Key Performance Indicators:**
    - The region will develop a script/talking points on the benefits of NACAS and NACAS East.
• Working with membership committee, each East board and committee member will contact two non-member schools per quarter to discuss the benefits of NACAS, and membership.

*Group responsible: NACAS East*

11. Grow member schools in the South Region by 4% in 2018 and 4% in 2019.

*Key Performance Indicators:*

• Recruit and award 10 scholarships to professionals from non-member schools and member schools to attend the NACAS South Regional Conference in 2018. Increase number of scholarships in 2019 (based on budget availability).
• Reach out to 2 non-member schools monthly via phone or face-to-face to promote membership in NACAS – total of 20 direct contacts by June 2019.
• Determine top 5 needs of non-member schools via a NACAS South Needs Survey attracting at least 30 responses - by July 2018.

*Group responsible: NACAS South*


*Key Performance Indicators:*

• Secure an annual 50% renewal rate of institutions that take advantage of the NACAS West subsidy.
• Perform personal outreach by NACAS West board members to each NACAS West institution at least once per year.
• Perform an annual survey of NACAS West institutions to determine their perceived value of membership.

*Group responsible: NACAS West*

13. Increase recruitment by 5% net per year for 2018, 2019, and 2020.

*Key Performance Indicators:*

• Reach out to two non-member institutions per month.
• Award at least four 50% membership subsidies per year.

*Group responsible: NACAS West*

**Standardized Metrics**

*Satisfaction*

While specific strategic goals and KPIs will vary between regions and committees, using uniform satisfaction metrics will streamline discussions regarding event, program, and education improvement. The following metrics will be used across all NACAS entities to evaluate satisfaction with educational content, programs, services, and events:

1. **Customer Satisfaction Score (CSAT)**
   a. To be used for education, panels, general, or keynote session ratings
   b. Utilizes a 1-5 numerical or stars rating scale: (1) Very Unsatisfied, (2) Unsatisfied, (3) Neutral, (4) Satisfied, (5) Very satisfied
c. Calculated by:
\[
\frac{\text{Total # responses satisfied} \quad \& \quad \text{very satisfied}}{\text{Total # survey respondents}} \times 100 = \text{CSAT score}
\]

2. Net Promoter Score (NPS)
   a. To be used for overall satisfaction assessment of an event or program
   b. The score falls in an index ranging from -100 to 100 that measures the willingness of respondents to recommend an organization’s programs or services to others. It is used as a proxy for gauging the respondent’s overall satisfaction and loyalty to an organization or program.
   c. This score is intended to be a simple way to gauge big picture loyalty and satisfaction beyond specific content or event offerings. This allows NACAS to understand satisfaction from start to finish in an event pipeline (registration process, education offerings, customer service, volunteer interaction, perception of belonging, learning outcomes, etc).
   d. Numerical scale 0-10:

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   e. Calculated by:
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   \frac{\% \text{Promoters of all responses}}{\% \text{Detractors of all responses}} = \text{NPS score}
   \]
   Note: the final score is an integer, not a percentage

Membership
NACAS regions, the Canadian Committee, and the Membership Committee have aligned to set goals that match the overall annual NACAS goals for membership recruitment and retention. While each group may have varying goals and KPIs, if all are achieved NACAS will meet or exceed overall membership goals for the organization.

Monitoring & Adjusting the Strategic Plan
All NACAS entities are responsible for specific objectives outlined in the strategic plan in order to achieve the strategic initiatives and make progress towards NACAS’ envisioned future for auxiliary services. On a quarterly basis, the Committee Chair Council (CCC) will track the progress towards these goals and recommend adjusted KPIs if needed. Additionally, the full NACAS Leadership Team will review the 2018-2021 Strategic Plan annually.