
NEACUHO Self Study Task Force
Final Report
Presented to the Executive Board
May 11, 2011

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INTRODUCTION

Background

In July 2009, President-Elect Jen Hapgood announced to the Executive Board plans to commission the third Self-Study of NEACUHO, since it had been about 10 years since the last study was completed. Peter Galloway from West Chester University of Pennsylvania was selected to chair the Self-Study Task Force. Other members of the team include Jon Conlogue, Westfield State University (Past President), Sonya Alexander, then at the University of Hartford, now at Central Connecticut State University (new professional), and Kim Schmidl-Gagne, Keene State College (mid-level professional).

Task Force Charge

The Executive Board outlined the following expectations of the Self-Study Task Force:

- The Self-Study will be a one year project
- Data will be collected through town meetings, surveys, and a page set up specifically for the Self-Study on the NEACUHO website
- The chair of the task force will report directly to the President
- The chair or designee will make regular reports to the board about the progress of the study
- The President-Elect will take the recommendations presented by the task force and begin the implementation during their presidency
- The Self-Study Task Force will make recommendations to the President one month prior to the Annual Conference
- The recommendations of the task force will be presented at the Annual Business Meeting in June 2011.

The charge for the Task Force was split into two main focus areas: internal and external. Specifically, information in the following areas would be collected:

Internal Focus: The organization has been functioning with a constitution since 2003. The Executive Board has also grown in size, including the recent addition of a new District Coordinator. Has the board become too large? Is the District Coordinator role accomplishing what it was originally developed for? Who should hold voting rights on the Board? Has the Board relied too heavily on in person meetings or can more be done with technology?

External Focus: Our membership is ever changing. There has been an increase in community colleges with housing programs in our region, as we move more things on line our membership is receiving less in their hands, new conferences and events have been added to the calendar, and we do not seem to meeting the needs of our more seasoned professionals. NEACUHO has also developed a Corporate Affiliate plan, which has brought Corporate Partners and Associates into our organization. What changes does NEACUHO need to make to meet the ever-changing needs of our membership and our corporate affiliates?

Work To Date/Data Collection

The Task Force began work in May 2010 to prepare for the year ahead. Data collection began at the Annual Conference at Roger Williams University in June and continued through January 2011. The groups surveyed, the means of data collection, and the number of people participating are noted in the table below:

Group Surveyed	Method of Data Collection	Number Participating*
General Membership	Focus Groups at Annual	7
Past Presidents	Focus Group at Annual	12
General Membership	On-Line Survey	160
General Membership	“Town Hall” Session at Fall Drive-In	71
Past Executive Board Members	On-Line Survey	44
Current Executive Board Members	On-Line Survey/In Person Discussion	21
Corporate Sponsors/Exhibitors	On-Line Survey	9
GLBT/Professionals of Color/Women and Allies	Paper Survey at Social Issues Retreats	25

*Note: it is possible that people could have participated in more than one survey, as the questions asked of the various groups were different, although some basic questions were asked in all surveys

Except for the Corporate Survey, demographic information was collected. The approximate breakdown of those participating is as follows (survey results are in the first column; overall membership statistics are in the second column):

- Experience Level:

New professionals (0-3 years)	34%	51%
Mid level professionals (4-7 years)	25%	19%
Seasoned professionals/CHOs (more than 7 years)	41%	29%

- Geographic/District of Current Institution:

Maine/New Hampshire	8%	6%
Eastern New York/Vermont	8%	7%
Western New York	22%	26%
Metro New York	9%	14%
Massachusetts	33%	34%
Connecticut/Rhode Island	19%	13%

- Position Focus (many participants chose more than one response to this item) in order of responses:

Residential Life	87%
Supervision	45%
Student/Staff Development	42%
Conduct	36%
Housing/Occupancy Management	35%
Programming	34%
Budget Management	25%
Advising Student Organizations	21%
Operations	21%
Facilities	20%
Conferencing	9%
Information Systems/Development	6%

- Involvement with NEACUHO:

Attended a NEACUHO Annual Conference	36%
Attended other NEACUHO Events	55%
Presented at a NEACUHO Event	34%
Currently serve on a NEACUHO Committee	29%
Previously served on a NEACUHO Committee	31%
Currently serving on NEACUHO Executive Board	14%
Previously served on NEACUHO Executive Board	10%

It was the intent of the Task Force to obtain feedback from staff at non-member institutions. However, logistics and timing prevented this from happening. Depending on which of the recommendations the Executive Board chooses to move forward with, it might be beneficial to solicit this insight before finalizing a plan for action.

Processing

All of the data collected from the various constituencies and survey methods were compiled together. Each Task Force member reviewed the results individually. The Task Force then met face to face in early January to process individual observations and determine which topics of interest would be included in the recommendations that would be presented. Members took the various topical categories and wrote a draft report, which was reviewed by the others. The compiled draft report, combined with the background and demographic information noted above, was presented to the NEACUHO Executive Board at their meeting on February 24 in Portland, ME.

Using feedback received from the Executive Board, the draft report was modified. A final set of recommendations was delivered to Jen Hapgood, NEACUHO President in May. The Task Force will present these recommendations during the Business Meeting at the Annual Conference at the Rochester Institute of Technology in June 2011.

MISSION

Description

Definition (source: Susan M. Heathfield, About.com Guide): **A mission statement** is a precise description of what an organization does. It should describe the business the organization is in. It is a definition of “why” the organization exists currently. Each member of an organization should be able to verbally express this mission.

Constitution

NEACUHO’s Constitution (below) incorporates what can be interpreted as the organization’s mission statement and goals in its first three Articles.

Article I – Name: The name of this organization shall be the Northeast Association of College and University Housing Officers and hereafter shall be referred to as NEACUHO.

Article II – Mission: NEACUHO is a nonprofit organization of housing, residential life, and student services professionals and paraprofessionals within the Northeast region dedicated to providing opportunities for colleague support, professional development, sharing of information, collaboration, communication, research, and recognition of outstanding contributions to the field.

Article III – Principles and Purposes: The principles and purposes of NEACUHO shall be:

Section 1. To facilitate the affiliation and professional development of housing, residential life, and student services professionals and paraprofessionals within the Northeast region.

Section 2. To contribute to the knowledge and improvement of operational management and student development in housing/residence life programs for students and staff members in institutions of higher education at all professional levels.

Section 3. To act, both as individuals and as an organization, in a manner that is ethical, professional, and supportive of the value, dignity, and diversity of all individuals.

Section 4. To sponsor such activities and services that will contribute to the aforementioned objectives.

Section 5. To work with the Association of College and University Housing Officers - International (ACUHO-I) in promoting professional development opportunities for the region.

Section 6. To work with the Northeast Affiliate of College and University Residence Halls (NEACURH) in promoting a positive living environment for residence hall students.

Taken together, the first three Articles of our Constitution specify that NEACUHO is intended to serve multiple roles and constituencies. While this mission is clear and comprehensive, respondents to our various surveys and in-person data collection efforts indicate that NEACUHO is falling short in fulfilling this mission for many of our constituents. In these areas, the survey responses frequently did not correspond with the comments attached to the questions. For example, the general membership survey responses to the statement, “NEACUHO events meet the needs of all target groups of members (CHO, mid-level, new professionals, residence life, housing, operations, student services etc.)” were as follows:

Answer Options	Response Percent	Response Count
Strongly Agree	3.4%	3
Agree	37.5%	33
Neutral	17.0%	15
Disagree	17.0%	15
Strongly Disagree	8.0%	7
I don't have enough information/ experience to offer an opinion	17.0%	15

When these results are broken down by staff levels, however, we find that 55% of Mid-Level staff and 50% of CHO’s responded to this question by selecting ‘Neutral,’ ‘Disagree’ or ‘Strongly Disagree.’ These respondents appear to be well-represented in the comments provided on this question, (and supported by similar comments from related survey questions and from participants at open forums).

In particular, these ‘seasoned staff’ respondents were convinced that our service to, and focus on, new professionals is disproportionately great when compared with our service to paraprofessional staff (including both undergraduate and graduate students), mid-level staff, and CHOs.

Several comments were recorded regarding the focus on new professional development and issues and included cautionary notes about likely outcomes if this focus continues, as reflected below:

- “NEACUHO has become extremely focused on new professionals. As a seasoned professional I find that there are few quality opportunities for professional development. Even at a specialized event like the Res Ops Drive-In there were few quality programs, since everything was basic and more geared to new professionals. If you want to keep seasoned professionals involved provide quality experiences. Otherwise, put out there that the group’s mission is to provide pro dev opportunities to new professionals and let more qualified groups like APPA, ACUHO-I and NASPA provided professional development for seasoned professionals.”
- “Seasoned professionals have left NEACUHO due to a perceived lack of content for them.”

Other respondents expressed the idea that NEACUHO could (or should) primarily focus on addressing the needs of certain groups

- “I continue to believe that we need to focus on serving a particular group (new professionals or mid-level) instead of trying to be “all things to all people” which undermines our overall effectiveness and credibility.”

These comments usually concluded that the appropriate group to focus on would be new professionals.

In tandem with these observations about disparate levels of service to new professionals compared to other levels of staff, respondents observed that NEACUHO’s recent events and activities consistently address only a select group of functional areas. Consider the breakdown of staff roles provided by respondents to the online general membership survey:

Answer Options	Response Percent	Response Count
Residential Life	86.8%	138
Student/Staff Development	41.5%	66
Programming	34.0%	54
Advising Student Organizations	21.4%	34
Conduct	35.8%	57
Supervision	45.3%	72
Housing (Occupancy Management)	34.6%	55
Facilities	20.1%	32
Operations	20.8%	33
Conferencing	8.8%	14
Information Systems/Development	6.3%	10
Budget Management	25.2%	40
Other (please specify)	9	9

It seems likely that there would be a significant level of overlap between the ‘staffing level’ and ‘functional area’ groupings. For example, surveyed CHOs are more likely to have significant levels of responsibility for budget management than student staff or new professionals.

Overall, the events sponsored by NEACUHO meet the needs of the wide range of members interests, positions and experiences.

Answer Options	Response Percent	Response Count
Strongly Agree	5.7%	5
Agree	54.5%	48
Neutral	9.1%	8
Disagree	11.4%	10
Strongly Disagree	6.8%	6
I don't have enough information	12.5%	11

Recommendations

If the organization chooses to focus on new professionals, then we would recommend revising our mission statement to accurately reflect this narrower charge. The majority of respondents did not believe that focusing on new professionals was the appropriate path for the organization to take, nor does the Self-Study Task Force endorse such a radical reduction in NEACUHO's charge. If we intend to fulfill our Mission, Principles and Purposes as currently delineated, then significant changes are necessary.

The Self -Study Task Force Recommends that the organization address the following questions:

- How do we serve paraprofessional staff other than through the current RD2B events?
- If a significant population of graduate students is identified, are the needs of graduate students different from those of paraprofessionals and/or professionals? How do we address the needs of graduate students?
- How do we better acknowledge and address the needs of new professionals in entry level positions with more than 3 years of experience?
- Is the quantity of events and programs targeted toward new professionals commensurate with the quality?
- How can we effectively and consistently address the needs of mid-level staff and CHO's in our events, online resources, and other avenues?

A broadening and strengthening of our offerings in several of the areas noted above would seem to be necessary if we intend to fulfill our mission of contributing "to the knowledge and improvement of operational management and student development in housing/residence life programs for students and staff members in institutions of higher education at all professional levels." Absent this, NEACUHO may continue to struggle to attract and retain participation from members whose primary needs fall outside the residence life and staff development areas.

VISION

Description

A vision is a statement about what your organization wants to become. It should resonate with all members of the organization and help them feel proud, excited, and part of something much bigger than themselves. A vision should stretch the organization's capabilities and image of itself. It gives shape and direction to the organization's future. Visions range in length from a couple of words to several pages. The Self-Study Task Force recommends shorter vision statements because people will tend to remember a more directed and succinct organizational vision.

In the past, NEACUHO has afforded considerable autonomy to its elected and appointed officers to set a course for the organization. This level of autonomy has been mediated by the difficulties inherent in effecting significant changes within a large, diffuse organization within a short time period (for example, the one-year term as President). Having a clearer vision and implementing a strategic plan might reduce autonomy; but it could also increase the membership's awareness of NEACUHO's purpose and priorities, and build in greater accountability for achieving them.

NEACUHO's vision is impacted by the divide between what we are constituted to do and what we are (and are not) doing. Many members, including a plurality (44%) of the respondents to the general membership survey, could not identify whether or not our current programs and practices were aligned with our vision, with many questioning whether we even have a vision.

Recommendation

Since NEACUHO's vision currently changes with the yearly transition of Executive Board members, the Self-Study Task Force recommends that NEACUHO work with broad constituency groups to develop an articulated Vision and that sharing of the Vision Statement be a focus during all future Executive Board training. The Task Force also recommends developing an initial and on-going communication plan to educate the membership regarding a vision statement.

STRATEGIC PLANNING

Description

While there were no questions specific to Strategic Planning on most of the surveys, many of the comments supplied in answer to other questions made reference to planning for the future or specifically to the need for a strategic planning process. In the survey of past Executive Board members, almost no one disagreed with the need for a long range plan; the biggest questions were the period of time the plan should cover (3, 5, 7 or 10 years), whether the Self-Study would support the need for a plan, and concern that specific implementation deadlines are placed on items within the plan so that progress can be measured and a level of accountability enforced.

Recommendations

The membership clearly articulated a need for a clear and consistent long-term plan for the organization to guide leadership. The Self-Study Task Force recommends that Executive Board design and begin implementation a Strategic Plan during the 2011-12 Presidential term.

It would seem prudent to complete a mission/vision process or discussion prior to undertaking any strategic planning process. However, the Executive Board is encouraged to start these activities as soon as possible, since the combined time frame needed for both efforts will be significant, especially if input is desired from the general membership.

GOVERNANCE

Description: Executive Board Structure and Composition

	General Membership			Current Executive Board			Past President/Eboard		
	Strongly Agree	Neutral Disagree Strongly Disagree	Don't Know	Strongly Agree	Neutral Disagree Strongly Disagree	Don't Know	Strongly Agree	Neutral Disagree Strongly Disagree	Don't Know
Eboard effectively manages the business and programs	SA=8% A=33% (41%)	N=12% D=9% SD=2% (23%)	36%	SA=20% A=50% (70%)	N=30% D=0 SD=0 (30%)	0	SA=17% A=31% (48%)	N=24% D=3% SD=0 (27%)	24%
14 appointed large enough working group	SA=8% A=40% (48%)	N=11% D=7% SD=1% (19%)	33%	SA=35% A=40% (75%)	N=10% D=5% SD=5% (20%)	5%	SA=26% A=30% (56%)	N=4% D=26% SD=4% (34%)	11%
11 elected representative voting contingent	SA=10% A=38% (48%)	N=13% D=5% SD=2% (20%)	32%	SA=35% A=25% (60%)	N=15% D=25% SD=0 (40%)	0	SA=36% A=36% (72%)	N=11% D=7% SD=7% (25%)	0

The Executive Board structure has been relatively consistent over the past ten years. While Presidents have had different approaches to addressing specific issues with short and long term task forces, the basic composition of elected and appointed officers remains much as it was after the development of the Constitution and By Laws. In the spring of 2010, the membership voted to add an additional District Coordinator and restructure two of the districts.

In general, the results above seem to suggest some ambivalence regarding the effectiveness of the Executive Board. The comments suggest that some of this is as an acknowledgement of the balancing act the organization must play with volunteer base responsible for leadership. Comments suggested that there was concern that perhaps the size of the board is too large, but other comments point to qualitative concerns regarding the level of experience of board members, accountability of board members, quality in terms of the “products” of the organization, too narrow of a focus on New Professionals and coordination of communication specifically in regards to those in voting positions soliciting and receiving feedback from constituency groups.

There were also concerns expressed regarding the inequality of the “work-load” of board members. There seemed to be some consensus that a small number of board positions do most of the work of the organization which may also be connected to the perception that there are varying levels of commitment by board members. Several respondents commented regarding the disparity of the work-loads between the elected and voting Secretary position (particularly now with the Historian Role) and the appointed but non-voting Membership Coordinator. Others wondered if perhaps there might be some process created so that the Treasurer might not have to handle all registrations. Additionally, current board members described a need for more structured support in their positions.

Thirty-six percent of the membership report not having enough information to comment on the effectiveness of the Executive Board, and looking more deeply at the numbers 54% of New, 30% of Mid and 27% of Senior Professionals state they not aware enough of the Board functioning to judge effectiveness. While the number for New Professionals is understandable as they learn more about NEACUHO, it is concerning that significant numbers of Mid and Senior Level Professionals also felt they could not comment.

Recommendations: Executive Board Structure and Composition

The Self-Study Task Force recommends that the Executive Board consider restructuring the Board. Size is a concern; however, it seems more clear that the needs of the membership are not being met at the level at which the organization aspires. In under-taking a restructuring, the Board should review dynamic models, which along with a strong leadership body include consideration of regional, institution type (i.e. community colleges, public/private, traditional four year/research), knowledge based and constituency based representation and a committee structure which fully supports the organization’s Mission.

As the form of a new board emerges and positions or committees become defined, the Self-Study Task Force encourages the Executive Board to consistently review the number and scope of responsibilities, while ensuring that each position or committee has

concrete and tangible tasks/outcomes that can be assessed.

As positions are developed, we recommend distributing “supervision” of positions beyond the three president positions. Depending on the final board design it may be that all elected board members have responsibility for committees which are naturally related to the elected position. For example, if the board were to create elected positions for experience based constituencies, then a committee like Risk Management and Legal Issues or Residential Operations might fall under the position which represents Senior Housing Officers. This will also require enhanced communication among the Elected Officers and it may be necessary for more frequently scheduled meetings or other effective methods of information sharing.

Finally, the Self-Study Task Force recommends that the Executive Board develop a variety of ways to make the work of the Board more transparent and accessible to the membership. This may include a “Communications Officer” who manages others including those working on publications, the web, Facebook and Twitter to ensure consistent and timely messaging about events. The membership has provided several suggestions which can be found in the “Simple Suggestions” at the end of this document that may prove helpful.

Description: Executive Board District Coordinators

	General Membership			Current Executive Board			Past President/Eboard		
	Strongly Agree	Neutral Disagree	Don't Know	Strongly Agree	Neutral Disagree	Don't Know	Strongly Agree	Neutral Disagree	Don't Know
Regional Representation is important	SA=36% A=43% (79%)	N=7% D=0 SD=0 (7%)	15%	SA=55% A=25% (80%)	N=15% D=0 SD=5% (20%)	0	SA=39% A=36% (75%)	N=7% D=11% SD=0 (18%)	7%
DCs are effective in providing regional representation	SA=7% A=25% (32%)	N=21% D=8% SD=0 (29%)	39%	SA=15% A=30% (45%)	N=25% D=15% SD=5% (45%)	10%	SA=7% A=32% (39%)	N=25% D=11% SD=7% (43%)	18%

As is clear from the surveys, most respondents feel that regional representation is important; however, what representation means has been broadly interpreted and implementation of the role by individual District Coordinators seems to be inconsistent. Most often comments described the District Coordinator position as a voice, advocate or a liaison for a certain geographic region to the larger organization and as someone who provides networking opportunities, both social and professional, within the district. A few members responded that the role also included recruitment and retention of member institutions to NEACUHO. A review of the District Coordinator responsibilities in the current Constitution and By Laws confirms the liaison and recruitment roles, specifying that each Coordinator provide communication to their districts at least twice a year. It does not discuss the networking and social/professional development opportunities that have become thought of as an expectation of the role.

While implementation of the liaison and networking role seems inconsistent, ranging from comments that members were hearing from their District Coordinators on a regular basis to others who stated they did not know their Coordinator, one piece that seems clear is that neither those perceived as high or low performing District Coordinators were seen as effectively soliciting feedback from constituencies before voting. This may be in large part due to the manner in which meeting agendas are planned and distributed. Since reports are usually collected and collated approximately a week before an Executive Board Meeting and then distributed with an agenda just days prior, it makes it challenging at best for a District Coordinator to inform constituencies of pending votes and solicit feedback.

Additionally, several respondents commented that they were unsure of the “formula” for the design of Districts, particularly considering the density of institutions in Massachusetts. The Self-Study Task Force understands that the Districts have been developed using an imperfect balance which considers the number of schools/individual members with the geographic mileage of a region and the desire to control the number of board members as well as the size of a “voting block.”

Recommendations: Executive Board District Coordinators

The Self-Study Task Force recommends that, whether or not the Executive Board commissions a full scale restructuring of the board, it should consider clarifying the expectations of the District Coordinators, specifically around the networking and social/professional development opportunities. In addition, while the Self-Study Task Force recognizes the concerns of adding positions to the board, if regional representation continues the Executive Board should consider splitting Massachusetts into two districts due to the density of schools in the state.

The Executive Board should consider operating procedures that would allow for communication and the opportunity for feedback between a Coordinator and their district regarding important issues.

Description: Elections/Appointments

	General Membership			Current Executive Board			Past President/Eboard		
	Strongly Agree	Neutral Disagree	Don't Know	Strongly Agree	Neutral Disagree	Don't Know	Strongly Agree	Neutral Disagree	Don't Know
All positions should be elected	SA=5% A=16% (21%)	N=23% D=22% SD=6% (51%)	30%	SA=10% A=20% (30%)	N=10% D=30% SD=25% (65%)	5%	SA=4% A=4% (8%)	N=25% D=39% SD=25% (89%)	4%

The issues related to the manner in which individuals attain positions on the Executive Board have been discussed since the Board was first constituted. It seems clear from the results of the survey that most respondents are not in favor of electing all positions. Arguments against electing all officers include: the administrative challenges and timeline needed to accomplish the task; concerns that those elected may not have skills and experience necessary for some positions (although it was noted that the Treasurer is an elected position that requires specific skills); membership's lack of awareness of the responsibilities of some positions; and, the President's ability to appoint a "cabinet" to achieve goals. The Self-Study Task Force does not recommend elections for all positions.

One issue regarding the board that arose in the comments is setting some minimum qualifications for all positions and/or setting specific requirements for the more specialized positions. Respondents concerns seem to arise from the balance of new and experienced board members and questioning if some of the new members have the experience necessary for their elected and appointed positions.

Recommendations: Elections/Appointments

The Self-Study Task Force recommends that the Executive Board consider developing flexible minimum qualifications for all positions (i.e. one year in a professional position and in the region) and specific qualifications for more skill based positions (i.e. Membership Coordinator, Technology Coordinator and Treasurer). The Task Force recommends that individuals only be considered for appointment to Chair positions if they have served on the Committee at some point. The Task Force also recommends creating a formal procedure to ensure supervisor approval for support of an employee in a position on the Executive Board.

Description: Executive Board Voting Rights

	General Membership			Current Executive Board			Past President/Eboard		
	Strongly Agree	Neutral Disagree	Don't Know	Strongly Agree	Neutral Disagree	Don't Know	Strongly Agree	Neutral Disagree	Don't Know
All positions should have voting rights	SA=16% A=25% (41%)	N=13% D=17% SD=6% (36%)	24%	SA=0% A=50% (50%)	N=10% D=10% SD=25% (45%)	5%	SA=21% A=14% (36%)	N=4% D=25% SD=29% (57%)	7%

The issues around those on the Board who have a formal vote and those who do not are more challenging. The results above illustrate the dissonance, with those currently serving on the Board feeling most strongly that all members should have a vote. Comments indicate that there is a direct link between elected positions and voting; however, comments regarding appointed positions and the right to vote allude to the difficulties. Respondents were concerned that if the positions appointed by the President were allowed a vote, then a President could stack the board; conversely, comments were empathetic with the amount of work involved in some of the appointed positions and their inability to vote on issues of importance to them such as the location of a conference. There were several comments that connected the amount of work involved in a position with having a “voice” in the decision making.

Recommendations: Executive Board Voting Rights

Currently, the President can call a “sense of the body” before taking a vote to understand how the larger group is interpreting an issue but this procedure is not utilized in a consistent manner. Based on the survey, it appears that this process does not provide a strong enough opportunity for appointed members in the decision making process. The Self-Study Task Force recommends that the Executive Board explore options to more formally codify a voting process that includes the appointed officers but does not minimize the impact of the elected positions.

Description: Executive Board Training

	Strongly Agree/Agree	Neutral/Disagree/Strongly Disagree	Don't Know/Not Applicable
Aware of Full Range of Responsibilities	SA=25% A=50% (75%)	N=5% D=10% SD=5% (25%)	5%
Aware of Reporting Structure	SA=45% A=55% (100%)	N=0 D=0 SD=0 (0)	0
Received Sufficient Training	SA=0 A=50% (50%)	N=35% D=10% SD=0 (45%)	5%
Receive Sufficient Support From Reporting Officer	SA=20% A=50% (75%)	N=10% D=0 SD=0 (10%)	Not applicable 10% 5%

The current Executive Board reports being knowledgeable and prepared for their committee position responsibilities with most commenting that in the past they had been involved in the committee they were now chairing. Most suggested additional training on the history, Constitution and By-Laws, Executive Board practices, and budgeting. A number commented they felt well prepared for their committee work but have struggled with internal procedures.

Recommendations: Executive Board Training

The Self-Study Task Force recommends completing the current Operations Manual and making it widely available. The Task Force recognizes that this Manual should be continually enhanced and as possible, more specific position procedures should be included.

Training should include a comprehensive review of the history of the organization, Constitution and By-Laws, Executive Board functions and procedures, as well as budgeting. Budgeting training should cover financial guidelines, building a budget, and specific training for those responsible for events on conference budgeting.

In depth training should be provided to the Treasurer, Membership Coordinator and Technology Coordinator. Currently, there is overlap between the terms of the outgoing and incoming Treasurer. The Self-Study Task Force recommends that similar overlapping positions should be considered for the positions above to enhance training and service to the membership.

EVENTS

A number of questions in the various surveys spoke to the events that the Association offers in terms of quantity and populations served. However, many comments were made in regards to the quality of what is offered. It should be noted that recommendations in this area may be impacted by decisions made in relation to the governance questions listed above.

Description: Assessment of Needs

	Right Number of Events	Meet needs of interests, positions and experience	Meet needs of all target audiences
Strongly Agree	9.0%	5.7%	3.4%
Agree	44.9%	54.5%	37.5%
Neutral	20.2%	9.1%	17.0%
Disagree	12.4%	11.4%	17.0%
Strongly Disagree	0.0%	6.8%	8.0%
Not sure	13.5%	12.5%	17.0%

While there is no argument that each event that NEACUHO currently sponsors did meet a need at the time it was initiated, there does not seem to be any overarching process to assess the needs of the membership and develop a calendar of events that should be offered to best meet these needs, within the resources available.

Recommendations: Assessment of Needs

As an outcome of or in conjunction with the mission/vision and strategic planning processes, the Self-Study Task Force recommends that a comprehensive needs assessment of all experience levels, position responsibilities, institution types and regional diversity be undertaken to shape future program offerings. In addition, a summary of other events from the region should be compiled.

Description: Organizational Structure

Comments were received, mainly from the current Executive Board, regarding the inequality of responsibility for events – some committees oversee a significant number of events, others very few if any. For those committees with many events, specific event chairs are being appointed, adding an additional layer of authority and responsibility. Concerns were raised regarding how this was impacting the effectiveness of the events, especially in regards to the areas of quality and communication.

Recommendations: Organizational Structure

The Self-Study Task Force recommends a review of the current distribution of events among the various committees and redesignate responsibilities within the mission of each committee to create a more equitable plan for sponsoring these events.

Description: Structure/Format of Events

Multiple comments in the various surveys involved how the different events were structured, including a couple that stated “Why does everything have to be a conference?”

Recommendation: Structure/Format of Events

In an environment of increasing use of technology and decreased professional development funding, the Self-Study Task Force recommends an investigation of what information and services can be provided in an on-line format that would eliminate travel costs, how different events can be combined to reduce overhead costs, or if longer events can be repackaged into shorter time frames to allow for more one day travel. In addition, are there reasonable options to sponsor events or activities with other organizations to either lower costs or increase resources available, while providing valuable professional development opportunities for more of our colleagues (i.e. the joint sponsorship of the Women’s Winter Renewal Retreat this year)?

Description: Location of Events

Attention needs to be paid to where in person events are held, especially if the quantity is reduced.

Recommendation: Location of Events

While the geographic distribution in any given year will not be “perfect”, organizers must always be mindful of the placement of events to make them as accessible as possible to the membership.

Description: Cost of Events

While the surveys did not address financial issues, one related item regarding the cost of events did emerge from the feedback and discussions. Specifically, should all one day events be priced at the same rate, and should the Annual Conference rate be kept as consistent as possible from year to year. In both cases, this involves decisions regarding the use of Association resources and the accessibility of the various events/activities that are offered.

Recommendation: Cost of Events

Once a revised slate of events has been determined, the Self-Study Task Force recommends a review of the financial resources dedicated to each Association event and assess the relative merit of subsidizing the various activities relative to the subset of the membership it is designed to serve and the impact on the mission of NEACUHO.

Description: Quality/Quantity of Events

The results indicate that the various constituencies seem split about quantity of events that are offered. However, many comments addressed the concern that there was an inverse relationship between quantity and quality; the prevailing thought being that too many events were being offered and the sufficient time and resources were not being expended to make them worthwhile, at least for some segments of the membership.

Recommendations: Quality/Quantity of Events

After conducting the needs assessment and reviewing and adjusting the organizational structure, the structure/format of the events, locations and costs, the Self-Study Task Force recommends that a “business plan” be developed for each event, spelling out the stated goals, resources dedicated to the event, an outline of responsibilities, marketing plan, etc. For each event an assessment instrument will need to be developed to measure the above items and ensure that Association resources (both time and financial) are being used effectively and that member needs are being met.

OPERATIONS

Description: Financials

The membership has brought up concerns about financial planning and budgeting for the organization. The concerns include the decrease in funding for RD2B and RELI which takes away from the future of our organization. Budgets for various committees have been cut. How does this affect the function of these committees? Finally, the membership has expressed concern on how the transition to a 501(c)3 status has affected the budget, if at all.

Recommendations: Financials

The Self-Study Task Force recommends that the Executive Board undertake a review of current financial planning and budgeting procedures to ensure these procedures meet the needs of the organization and requirements of maintaining a 501(c) 3 status. The review should ensure that philosophy and procedures are applied consistently from year to year. Additionally, the Executive Board should create a model of budget planning for the future; including standardizing conference rates in a manner that allows flexibility for variability in location costs. The model should also include a formula to set aside funds to build a contingency equal to one year of operating expenses.

Description: Education of Membership

The membership does not have a clear understanding of the history and functioning of the organization. This topic was addressed through surveys sent to the general membership as well as the current Executive Board. Confusion about the Executive Board make up and how members are chosen to serve on the board was a frequent area of concern as discussed in a previous question. In addition the mission, vision and constitution are not well understood.

Recommendations: Education of Membership

The Self-Study Task Force, based on feedback from the membership, recommends providing education by vehicles such as presenting a part of the constitution regularly either through a Navigator article, Podcast, or other technology, and having the history and constitution be included as part of New Professionals Orientation at the Annual Conference.

Description: Membership Rates

Current Model (using 2009-2010 membership data)

Total # of Institutional Members: 150

Total # of Individual Members: 1567

Total Membership Fees Collected: \$10,800

Size	Cost	# of Institutions	# of Individuals	Avg # Ind/Inst	Cost/Individual
Small 0-1500	\$60	78	441	5.7	\$10.52
Medium 1501-3499	\$80	54	595	11	\$7.27
Large 3500+	\$100	18	531	30	\$3.33

The membership rates have stayed the same for a number of years and may not cover increases in services that are provided during conferences and the like. The chart above illustrates how smaller institutions are bearing the burden of cost per member and these same institutions may not see the same benefits as larger institutions who would send more staff to the events sponsored by NEACUHO

Recommendations: Membership Rates

The Self-Study Task Force recommends a review of the membership fee structure to better balance the cost per member within different size institutions. As the Task Force discussed this issue we developed several models and present the model below for the Executive Board to consider and perhaps use as a starting place for discussion.

Potential Model

Total # of Institutional Members: 150

Total # of Individual Members: 1567

Total Membership Fees Collected: \$15,550 (an increase of \$4750)

Size	Cost	# of Institutions	#of Individuals	Avg # of Ind/Inst	Cost/Individual
Small 0-1000	\$50	52	255	4.9	\$10.20
Medium 1001-2000	\$100	47	361	7.7	\$12.98
Large 2001-4000	\$150	35	477	13.6	\$11.03
Ex Large 4001+	\$200	15	475	31.7	\$6.31

Description: Technology

The use of technology (email, website, podcasts) is enhancing the sense of community within NEACUHO.								
	General Membership	Current Eboard	Eboard 4+ Years	Eboard Less than 4	Elected Eboard	Appointed Eboard	PP and Eboard	New Professionals
Strongly Agree	5.7%	15.0%	0.0%	23.1%	11.1%	20.0%	14.8%	4.5%
Agree	50.0%	50.0%	28.6%	61.5%	44.4%	50.0%	40.7%	59.1%
Neutral	28.6%	25.0%	57.1%	7.7%	33.3%	20.0%	14.8%	22.7%
Disagree	7.1%	0.0%	0.0%	0.0%	0.0%	0.0%	7.4%	0.0%
Strongly Disagree	1.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
I don't have enough information/experience to offer an opinion	7.1%	10.0%	14.3%	7.7%	11.1%	10.0%	22.2%	13.6%

Technology is ever evolving. NEACUHO can use technology to its advantage to increase membership satisfaction. This can be done by providing consistent ways for the membership to send out and receive information, register and pay for conferences, and allow for other avenues of information sharing through webinars and the like.

Recommendation: Technology

The surveys included questions regarding technology and the Self-Study Task Force has several recommendations for the Executive Board to consider regarding the future use of technology and the advancement of NEACUHO. The membership is looking for a healthy balance between using technology and face-to-face interaction for information sharing. The Self-Study Task Force believes the membership is looking for Podcasts, live town meetings, webinars and teleconferencing to provide more opportunities for professional development while keeping face-to-face events available to increase community building amongst the membership. Further items to consider include:

- Effectively and consistently utilize technology for administrative tasks of the organization such as a standardized online conference registration form and payment for events.
- Connect Facebook, Twitter, and the NEACUHO home page so all are referenced to each other by posting logos.
- Provide more information via social media. Many of our members are not aware that NEACUHO has Twitter and Facebook accounts. Those that are connected by Facebook and Twitter suggest that advertising using this media would help with disseminating information to the membership.
- Develop a message board on the website. The membership would need to log-in to be able to use the message board. This allows for another avenue for information sharing amongst the membership.

Description: Corporate Sponsorship

	Aware of Corporate Program	Corporate Program Important	Adequate Efforts to Engage Corporate
Strongly Agree	14.8%	15.9%	0.0%
Agree	29.5%	25.0%	25.3%
Neutral	5.7%	10.2%	14.9%
Disagree	14.8%	0.0%	4.6%
Strongly Disagree	13.6%	0.0%	0.0%
Not Sure	21.6%	48.9%	55.2%

What was found during the Self-Study surveys was the lack of awareness by the membership about the corporate sponsors program. Members who completed the survey stated that the corporate sponsor program was not very clear and many were not aware of its purpose. The only members who responded that were knowledgeable about the corporate sponsorship program were past and present Executive Board members.

Recommendations: Corporate Sponsorship

In order for this program to be beneficial, the Self-Study Task Force recommends that members are educated about the program. This education should include who the corporate sponsors are and the services they provide. In addition, more time for membership/corporate sponsor interaction is suggested as well. Currently, at the annual conference, the exhibitor fair is really the only opportunity for corporate sponsors to truly interact with the membership and vice versa. Other avenues for interaction should be investigated, such as allowing corporate sponsor presentations during the annual conference. This may also draw more mid-level and CHO's to the conference as well.

A separate corporate sponsor survey was completed specifically with the sponsors and affiliates of NEACUHO. According to their feedback, they are for the most part pleased with their relationship with NEACUHO. There are some suggestions that they would like to see and that the Task Force would like to highlight:

- The corporate sponsors suggest that new professionals are guided through the exhibitor fair at the Annual Conference. This will help to answer questions about the program as well as what services each vendor provides. This would be an excellent learning opportunity.
- Be mindful of logistics for the Annual Conference and Residential Operations Drive-In and Trade Show. This should include allotting for more time for set up and create spaces where traffic does not get held up by a group talking to a vendor. The walkway should be large enough to accommodate that.
- More communication from NEACUHO to the corporate sponsors. A suggestion that was raised to have the President communicate with them in order to find out what is going on with the organization.

CULTURE

Any organization, including professional associations and their governing boards, are a reflection of the people who make up the membership, both in individual and collective terms. The housing profession has a large number of seasoned staff who are close to retirement age, yet every year we welcome a cadre of new professionals who are just starting their career. What is the impact of these generational differences on an organization such as NEACUHO? What role does technology play in these differences? How does an organization develop a culture that is welcoming of a broad range of people (whether this is defined based on age, background, interests, etc.) and continue to engage each of these different subgroups in a meaningful way?

Description: Communication

The key to building a cohesive community among any group of people is communication. What gets communicated, in what format, and by whom, are all important aspects of an effective communication plan. A large number of responses to many of the questions on the various surveys was the choice “I don’t have enough information/experience to offer an opinion.” This may have been impacted by the way the survey questions were developed, or perhaps certain populations (new professionals) are more likely to respond this way due to their level of experience. It is also incumbent on individuals to seek out information at times.

Recommendations: Communication

NEACUHO needs to ensure that an effective communication plan is developed and implemented, consistently from year to year, in order to best inform the members (and at times non members) what the Association is all about and what services it offers. The Self-Study Task Force recommends that this plan needs to address information about events and opportunities to participate, but also governance decisions and the longer range plans for the organization: i.e. posting copies of minutes on the website, developing “talking points” from Executive Board meetings and distributing these to the membership, etc.

Description: Cliques

Most organizations are seen as having an “in group” – those who are currently or previously involved with the group at a significant level, most likely in a leadership role. It may just be human nature that these perceptions exist. However, whether real or perceived, these issues need to be recognized and, if appropriate, addressed. At its most basic level, the question comes down to how NEACUHO can be a more welcoming organization – a goal that probably will never be fully realized. Some of the responses to the surveys commented specifically on the Executive Board and the ability to become part of the leadership team for NEACUHO.

Recommendations: Cliques

While ongoing educational efforts regarding this should continue, a few basic questions might be in order to help clarify how the Board is viewed by the general membership: Why is it important that Executive Board members attend all of the events? Do the Board members understand what their role is at events that they are and are not directly responsible for? Do Board members need to be more easily identifiable – ribbons on name tags at events, a chance to speak at opening sessions at events, opportunities for open discussion between members and Board members?

Description Past Leadership

Organizations, especially all volunteer groups, are often a reflection of the past leadership. The involvement of past leaders can be critical to the success of an association, helping to pass along “institutional” knowledge and avoiding repeating past mistakes. However, the future of the organization is primarily the responsibility of the current leadership and those leaders yet to come, who will either set the vision for what the group should be or will be charged with making it happen. NEACUHO is blessed to have many past leaders still involved in the association, either actively or on an occasional basis. However, comments were received through the surveys that indicate a degree of discomfort between past and current leadership.

Recommendations: Past Leadership

While the level of involvement will always be subject to individual people's availability, interest and personality, a broader discussion may be in order to help both the past leaders and the rest of the membership create a constructive and meaningful context for their involvement. Questions to address would be things such as: What is the role of the past leadership of NEACUHO? How much influence should they have on the board and the current programs and practices of the organization? What is the best way to create an environment where there is mutual respect from all parties – those who have helped shape NEACUHO into what it is today and those whose role it is to transform it into the organization of the future?

SIMPLE ADMINISTRATIVE SUGGESTIONS

1. Membership

- Membership needs to include a category for those new to the region.
- Membership should include a category for graduate students.
- Take advantage of technology for reaching out to non members and provide them with anything that is free to encourage membership

2. Executive Board

- Members should have something visible that denotes them as such for conferences.
- Professional etiquette training for Executive Board

3. New Professionals/new to the region (perhaps now called “New Members”)

- Orientation at the Annual should be more than a social, there should be education on the organization including the Constitution and By Laws and Executive Board.
- Develop a similar but scaled down program for other conferences and for those who don’t attend conferences. Create a New Members page on the site. Create a welcome to NEACUHO packet that could be sent to those identified as New Members.

4. Meetings

- Plan for Executive Board meetings ahead of time so that District Coordinators can communicate with constituency groups and/or for those without enough information to gather more and educate self.
- Podcast Executive Board meetings, invite local members to sit in on Executive Board meetings.
- Summary of minutes out to membership within two weeks of a meeting (online approval of minutes one week after meeting) link to full minutes in the summary that are posted on the web.

5. Annual Business Meeting – adjust current structure, as it is seen as confusing and tedious.

6. Constitution and By Laws – add a clause to clarify the status of someone who loses their job due to factors outside of their control, i.e. “If an individual loses employment for economic reasons they will be allowed to serve in their current position until the board transition at the next Annual Conference.”