

# Strategic Plan

*Working Draft  
October 29, 2006*

*The Association of Inspectors General*



The Association of Inspectors General is now ten years old. Much has been accomplished in the Association's first decade.



- The Association now has almost 500 members.
- The Association has certified almost 400 persons under the Certified Inspector General Institutes. Seventeen Institutes have been conducted.
- The Association's certification and training programs are recognized by the National Association of State Boards of Accountancy for continuing professional education credit.
- Twenty national conferences have been conducted.
- The Association has published model legislation, along with the Green Book – Principles and Standards for Offices of Inspectors General.
- The Association has been addressed by the Secretary General of the United Nations, and has participated in international conferences and reviews concerning integrity and corruption.
- Officials from nations throughout the world have attended Association meetings and functions.
- The Association has engaged in relationships with several universities to promote the Inspector General concept.
- The financial position of the Association has consistently grown over the decade while investments have been made in new programs and services.

The organization is now at a point where a new level of organization performance and achievement is both possible and necessary. However, critical decisions must be made.

The Executive Committee, convened by the President as a Strategic Planning Committee, conducted an assessment of the current state of the Association, along with the challenges and opportunities which form the basis for a vision of the Association for 2012. The assessment was probing, candid and challenging. A range of views about the current state and possible futures of the organization were synthesized into this working document.

Action on some recommendations of this plan require immediate actions by the current and incoming Presidents. Other recommendations will require direction, ratification and action by the Association Board.

Critical immediate choices facing the leadership of the Association involve the authority, function and compensation of the Executive Director. The current Executive Director has announced his decision to complete a distinguished period of service at the end of this year. This fact presents the leadership of the organization with the need to make certain immediate choices. But the immediate choices should be informed by the Association's strategic planning.

Another immediate challenge and opportunity is the ongoing turnover of leadership in the field, especially in the immediate future due to the impending elections, particularly in states with high levels of Association participation.

The current structure and approach has served the Association well. However, continuation of past structures, approaches and practices will not permit the organization to take advantage of the opportunities and respond to the challenges that we face. To provide the level of services that our members deserve, and that are necessary to advance the Inspector General concept and field of practice, the Association membership and services must grow and the Association must achieve an even higher level of performance.

The Committee conducted the strategic assessment within the context of the Mission Statement of the Association, as established in the Bylaws a decade ago. The Mission Statement reads as follows:

*The Association of Inspectors General seeks to foster and promote public accountability and integrity in the general areas of prevention, examination, investigation, audit, detection, elimination and prosecution of fraud, waste and abuse, through policy research and analysis; standardization of practices, policies, conduct and ethics; encouragement of professional development by providing and sponsoring educational programs; and the establishment of professional qualifications, certifications and licensing.*

Based upon the Mission Statement, the committee identified seven strategic goals for the Association:

- *Provide effective governance*
- *Provide effective administration*
- *Promote the Inspector General concept*
- *Provide professional development opportunities*
- *Provide professional networking opportunities*
- *Promote the development and application of policy research and analysis*
- *Standardize policies, conduct, and ethics, based on best practices*

For each goal, the committee has drafted working objectives and actions, along with proposed assignments of responsibility.

The working plan represents the work product of two days and nights of intensive deliberation and effort immediately prior to the Fall 2006 Conference.

<b>Goal One: Provide effective governance</b>			
Performance Indicators:	<ul style="list-style-type: none"> <li>• Bylaws reviewed and presented in Spring 2007, finalized in Fall 2007</li> <li>• Succession Plan presented by Spring 2007, finalized in Fall 2007</li> <li>• The Board approves a leadership plan by Spring 2007</li> </ul>		
Objective	Actions	Responsibility	Comments
Revise, update and simplify the Bylaws	<ul style="list-style-type: none"> <li>• Establish a Governance Review Committee</li> </ul>	<ul style="list-style-type: none"> <li>• President and Board</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>
Propose Officer succession planning	<ul style="list-style-type: none"> <li>• Consult broadly with Board and membership</li> <li>• Review best practices and models.</li> </ul>	<ul style="list-style-type: none"> <li>• Governance Review Committee</li> </ul>	<ul style="list-style-type: none"> <li>• Consider electing officers-elect who would succeed to their positions.</li> </ul>
Review and recommend appropriate changes in Board composition	<ul style="list-style-type: none"> <li>• Consult broadly with Board and membership</li> <li>• Review best practices and models.</li> </ul>	<ul style="list-style-type: none"> <li>• Governance Review Committee</li> </ul>	<ul style="list-style-type: none"> <li>• Consider chapter leadership positions in governance bodies</li> </ul>
Review and recommend appropriate changes in committee structure and function	<ul style="list-style-type: none"> <li>• Consult broadly with Board and membership</li> <li>• Review best practices and models.</li> </ul>	<ul style="list-style-type: none"> <li>• Governance Review Committee</li> </ul>	<ul style="list-style-type: none"> <li>• Consider greater participation in committee functions at the chapter level.</li> <li>• Consider funding to support committee functions</li> </ul>

**Goal One: *Provide effective governance***

Determine the relative authority and responsibilities of the President, the Executive Committee, other committees, and the Executive Director.	•	• President and Executive Committee and Board	• This involves a critical choice about the role of the Executive Director – whether the role involves more than administrative functions.
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<b>Goal Two: <i>Provide effective administration</i></b>			
Performance Indicators:	•		
Objectives	Actions	Responsibility	Comments
Define the immediate and long-term duties and responsibilities of the Executive Director	<ul style="list-style-type: none"> <li>• Propose an immediate approach to the Executive Directorship</li> <li>• Consider the recommendation as to the relative authority and responsibilities of the President, Board and Executive Director.</li> <li>• Review the draft list of duties</li> <li>• Propose a long-term job description, including provisions for oversight</li> </ul>	<ul style="list-style-type: none"> <li>• The Executive Directorship Committee</li> </ul>	<ul style="list-style-type: none"> <li>• Consider whether the Executive Directorship should be a full-time position.</li> <li>• Consider the role of the executive director in the business operations of the association, and options for alternative approaches.</li> <li>• This involves a critical choice about the role of the Executive Director – whether the role involves more than administrative functions.</li> </ul>
Develop options for the administration of Institute	•	<ul style="list-style-type: none"> <li>• Certification Board</li> </ul>	<ul style="list-style-type: none"> <li>• Consider whether this should be a responsibility of the Executive Director.</li> <li>• Include an approach to oversight.</li> </ul>

<b>Goal Two: <i>Provide effective administration</i></b>			
Develop options for financial planning and administration, and for bookkeeping duties.	<ul style="list-style-type: none"> <li>• Consider options for contracting clerical functions</li> <li>• Propose long-term options for financial planning and administration.</li> </ul>	<ul style="list-style-type: none"> <li>• Treasurer and Finance Committee.</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>
Assess options for management of mail and official records.	<ul style="list-style-type: none"> <li>• Consider options for an official address and how mail eventually gets to the proper official.</li> <li>• Consider options for storage of documents and inventories of documents.</li> <li>• Develop a reliable system for documenting official certifications and for responding to inquiries.</li> </ul>	<ul style="list-style-type: none"> <li>• Secretary and Executive Director</li> </ul>	<ul style="list-style-type: none"> <li>• Consider maximum use of electronic records.</li> </ul>
Enhance the website to more effectively support the purposes and functions of the organization.	<ul style="list-style-type: none"> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• Executive Director</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>

**Goal Two: *Provide effective administration***

Address the immediate need for a way to provide Institute programs.

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- Certification Board

- The contract for delivering the institutes is expiring and a method to provide additional institutes needs to be implemented.

<b>Goal Three: <i>Promote the Inspector General concept</i></b>			
Performance Indicators:	<ul style="list-style-type: none"> <li>Increases in numbers of inquiries and responses.</li> </ul>		
Objectives:	Actions	Responsibility	Comments
Develop and distribute documents and promotional materials relating to the IG concept.	<ul style="list-style-type: none"> <li>Enhance the website to more effectively promote the IG concept.</li> <li>Develop a legislative information package.</li> <li>Promote the submission of letters and articles promoting the concept.</li> </ul>	<ul style="list-style-type: none"> <li>Executive Director</li> </ul>	<ul style="list-style-type: none"> <li>This involves a critical choice about the role of the Executive Director – whether the role involves more than administrative functions.</li> </ul>
Develop a program to provide technical assistance and advice to official inquiries about potential new IG laws, agencies and initiatives.	<ul style="list-style-type: none"> <li>Develop a speakers bureau to respond to public inquiries.</li> </ul>	<ul style="list-style-type: none"> <li>Executive Director</li> </ul>	<ul style="list-style-type: none"> <li></li> </ul>
Promote membership in the Association.	<ul style="list-style-type: none"> <li>Promote student membership in the association.</li> </ul>	<ul style="list-style-type: none"> <li>Executive Director</li> </ul>	<ul style="list-style-type: none"> <li></li> </ul>

**Goal Three: *Promote the Inspector General concept***

Maintain a formal roster of Inspector General offices.	<ul style="list-style-type: none"><li>•</li></ul>	<ul style="list-style-type: none"><li>• Executive Director</li></ul>	<ul style="list-style-type: none"><li>• It may be necessary for the Association to clarify the operational definition of the Inspector General when an official and/or agency is not explicated titled as Inspector General.</li></ul>
Assess the relationship of the Association to the IPSIG concept and function.	<ul style="list-style-type: none"><li>•</li></ul>	<ul style="list-style-type: none"><li>• The President should identify a committee to task force to make recommendations concerning this issue.</li></ul>	<ul style="list-style-type: none"><li>•</li></ul>

<b>Goal Four: <i>Provide professional development opportunities</i></b>			
Performance Indicators:	•		
Objectives:	Actions	Responsibility	Comments
Assess and identify training needs and interests.	<ul style="list-style-type: none"> <li>Establish a professional development committee.</li> <li>Assess training needs and opportunities related to the audit function.</li> <li>Assess the concept of a basic training program for new personnel.</li> </ul>	<ul style="list-style-type: none"> <li>The President should establish the committee.</li> <li>The committee should be designated with responsibility for this objective.</li> </ul>	<ul style="list-style-type: none"> <li>Involve the Chapters as authoritive sources for training needs in their service areas.</li> </ul>
Assess and identify opportunities for joint ventures with academic institutions.	•	<ul style="list-style-type: none"> <li>Professional Development Committee.</li> </ul>	•
Identify and develop quality instructors who will develop training materials.	• •	<ul style="list-style-type: none"> <li>Professional Development Committee.</li> </ul>	<ul style="list-style-type: none"> <li>Consider whether it should be part of the Institute</li> <li>•</li> </ul>
Assess how conferences and be used to promote and reinforce training.	•	<ul style="list-style-type: none"> <li>Professional Development Committee and the Conference Committee</li> </ul>	<ul style="list-style-type: none"> <li>Assess relationship between training and conference planning.</li> </ul>

<b>Goal Four: <i>Provide professional development opportunities</i></b>			
Develop a delivery plan for training services	•	• Professional Development Committee.	•
Assess the existing two certification programs.	•	• Certification Board	<ul style="list-style-type: none"> <li>• Assess whether continuing training for certified personnel is needed.</li> <li>• Assess the relationship between fees, costs, AIG revenues.</li> </ul>
Develop a candidate assessment approach.	•	• Certification Board	<ul style="list-style-type: none"> <li>• Include recommendations for assessment of applicants for certification, as well as assessment of learning at the institutes.</li> </ul>
Consider whether additional certification programs are needed.	•	• Certification Board	•
Determine whether policies and procedures are needed to assess continuing education of certified personnel.	•	• Certification Board	•
Develop a textbook for the CIG and CIGI institutes.	•	• Certification Board	•

<b>Goal Four: <i>Provide professional development opportunities</i></b>			
Assess whether there are ways to simplify the CPE documentation process.	•	• Certification Board	•
Assess possibility for distance learning approaches to provision of training services.	•	• Certification Board	•
Develop and implement a marketing program for AIJ training programs and services.	•	• Certification Board	•

<b>Goal Five: Provide professional networking opportunities</b>			
<ul style="list-style-type: none"> <li>• Exchange information and ideas</li> </ul>			
Performance Indicators:	•		
Objectives	Actions	Responsibility	Comments
Maximize contracts and exchanges of information between association members.	<ul style="list-style-type: none"> <li>• Promote attendance in the AIG conferences. Consider ways to enhance networking during conferences.</li> </ul>	<ul style="list-style-type: none"> <li>• Conference Committee</li> </ul>	•
Support opportunities for members to become aware of consulting opportunities or voluntary technical assistance requests.	•	<ul style="list-style-type: none"> <li>• The President should charge the Ethics committee to review and recommend policy as to the parameters of these activities</li> </ul>	<ul style="list-style-type: none"> <li>• Consider how AIG can offer services as a contracting or subcontracting entity.</li> <li>• Consider whether and how AIG can reconcile the independence and integrity of the organization while providing or brokering contracted services.</li> </ul>
Provide job referral services for members and member agencies	<ul style="list-style-type: none"> <li>• Review how the website can be updated to provide better position announcement services.</li> </ul>	<ul style="list-style-type: none"> <li>• Executive Director</li> </ul>	•

**Goal Five: *Provide professional networking opportunities***

- *Exchange information and ideas*

Promote communications and contacts at the local and regional level.

- Encourage the committee system to be more active including regular meetings.

- President and Chapter Presidents and regional leaders designated by the President

- Consider making assignments to chapters or taskforces of members residing within a region.

Review how the AIG website fosters networking over the internet.

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- Executive Director

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<b>Goal Six: <i>Promote the development and application of policy research and analysis</i></b>			
Performance Indicators:	•		
Objectives	Actions	Responsibility	Comments
Develop a strategy leading to the publication of a journal, but including intermediate steps.	• Identify ways to involve students in this process.	• The President should appoint a task force or committee to make recommendations.	• Consider using the newsletter as an incubator for a journal.
Improve the newsletter.	• Consider the concept of “project briefs” describing important investigations and reports produced by member agencies.	• The President should appoint a task force or committee to make recommendations.	• Consider increasing the frequency of publication.
Initiate one or more publications that present best policies and practices in the field.	•	• The President should appoint a task force or committee to make recommendations.	• Coordinate this with the development of the textbooks for the Institutes
Review how the website can support the dissemination of policy research and analysis	•	• The President should appoint a task force or committee to make recommendations.	•
Identify ways to collaborate with colleges and universities to foster policy research and scholarship.	• Consult with universities to define objectives and desired outcomes resulting from possible relationships.	• The President should appoint a task force or committee to make recommendations.	• Consider whether the AIG should establish one or more institutes either as AIG entities possibly partnered with university entities.

<b>Goal Seven: Standardize policies, conduct, and ethics, based on best practices</b>			
Performance Indicators:	•		
Objectives	Actions	Responsibility	Comments
Establish a specific procedure for the periodic review and update of the Green Book	<ul style="list-style-type: none"> <li>Review and update the Green Book as necessary.</li> </ul>	<ul style="list-style-type: none"> <li>Standards Committee</li> </ul>	•
Promote the adoption of the Green Book.	<ul style="list-style-type: none"> <li>Translate the Green Book into additional languages.</li> <li>Identify which offices have formally adopted the Green Book standards.</li> <li>Establish a program to explain the Green Book to every IG office</li> <li>Allocate funds to support promotion of the Green Book.</li> </ul>	<ul style="list-style-type: none"> <li>Standards Committee</li> </ul>	•
Initiate one or more publications that present best policies and practices in the field.	•	<ul style="list-style-type: none"> <li>The President should appoint a task force or committee to make recommendations.</li> </ul>	<ul style="list-style-type: none"> <li>Coordinate this with the development of the textbooks for the Institutes</li> </ul>

<b>Goal Seven: Standardize policies, conduct, and ethics, based on best practices</b>			
Establish a process of technical assistance and consultation for agencies interested in the Green Book standards but not yet willing or able to proceed with peer review.	•	•	• Consider allocating funds to support offering presentations of the Green Book and the peer review process for member agencies.
Develop a model ethics policy for members employed within Inspector General agencies.	•	• Ethics Committee	•
Promote research on best practices, including dissemination of findings.	• Examine ways that AIG committees can become involved in assessing best practices.	•	• Consider involving the universities in these initiatives.

Appendix

# Strategic Assessment

Status 2006	Vision 2012	Benefits/Consequences	Constraints/Comments
<p>Recognized nationally and internationally</p>	<p>Much greater recognition nationally and internationally</p> <p>AIG recognized as the premier organization for ethics and integrity.</p>	<ul style="list-style-type: none"> <li>• B: People look to AIG as a resource</li> <li>• C: AIG would stall, stop growing, lacks significance</li> <li>• C: Membership attrition</li> </ul>	<ul style="list-style-type: none"> <li>• Level of commitment by the members. Key members need to take responsibility and work hard.</li> <li>• New members need sense of ownership and passion.</li> <li>• New members may perceive that the organization is more developed than it is.</li> <li>• We don't have an organizational structure to accomplish this.</li> <li>• We are often reactive.</li> </ul>

Status 2006	Vision 2012	Benefits/Consequences	Constraints/Comments
<p>We have a strong core membership. But many of the same people attend each time. Other members are transient – while they are in the IG service. Newer members are less committed. Some IGs view this as an organization for top staff.</p>	<p>Expanded membership that includes other levels of the organizations involved. Membership should be perceived as being open to anyone in the field.</p> <p>Membership should be valuable for people who cannot attend the conferences.</p>	<ul style="list-style-type: none"> <li>• C: Staff don't get the benefits of the meetings.</li> <li>• B: Builds future membership.</li> </ul>	<ul style="list-style-type: none"> <li>• Making trips to the conferences can be expensive for the members and their organizations.</li> <li>• Do we subconsciously resist inviting a new level of new members?</li> <li>• Have we reached out to the Feds as much as we should?</li> <li>• Do we send unconscious barriers to new membership.</li> <li>• Do we depend on the core membership too much?</li> <li>• What is our view about IPSIGS and other related oversight organizations?</li> </ul>

Status 2006	Vision 2012	Benefits/Consequences	Constraints/Comments
We have three chartered local chapters.	We should have more local chapters, that include federal IGs.	<ul style="list-style-type: none"> <li>• B: Local chapters can reach more people more efficiently.</li> <li>• B: Local chapters can promote national membership.</li> </ul>	<ul style="list-style-type: none"> <li>• How should Chapter Presidents be represented in Association governance?</li> <li>• Some chapters may be limiting chapter membership to the leaders.</li> <li>• Dual membership may limit participation. Members are willing to participate in the local chapter but don't see the benefit of the national membership.</li> </ul>
We don't have succession planning.	We need a succession plan that identifies key new leadership for the future.	<ul style="list-style-type: none"> <li>• B: Can encourage new membership.</li> </ul>	<ul style="list-style-type: none"> <li>• Grandfathered board memberships limit opportunities for board membership.</li> <li>• People drift away without us knowing at the time.</li> </ul>
Student memberships are weak	We should have a strong student membership.	<ul style="list-style-type: none"> <li>• B: Promotes future membership.</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>

Status 2006	Vision 2012	Benefits/Consequences	Constraints/Comments
<p>Newsletter is valued by the members. It gives the offices an opportunity to showcase activities.</p> <p>The newsletter depends on volunteer submissions. Four to five offices are the contributors.</p>	<p>Articles from a wide range of agencies should demonstrate interesting methods and techniques. The newsletter should be much longer and include audit and investigation abstracts that include summaries of benefits. The newsletter should also include job postings and might sell advertising. Students could participate in writing the abstracts.</p> <p>The newsletter should be a national publication that goes out to beyond the membership.</p> <p>The newsletter might include a profile of an office on each issue. What is the same and what is different about each office.</p>	<ul style="list-style-type: none"> <li>• B: Members appreciate the newsletter.</li> <li>• B: Newsletter is a key form of outreach to members at all levels.</li> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>• It's hard to write the articles.</li> <li>• Some investigations don't need to be nationally announced.</li> <li>• Agencies don't follow the expected outline.</li> <li>• We haven't asked the membership what they want in the newsletter.</li> </ul>
<p>We are not aware of all IGs.</p>	<p>We should be aware of all IGs in the nation.</p>	<ul style="list-style-type: none"> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>
<p>We do not have a Journal.</p>	<p>We should have a national journal that is read by officials outside of the AIG membership.</p>	<ul style="list-style-type: none"> <li>• B: A Journal is perceived as a significant benefit.</li> <li>• B: A journal improves our reputation.</li> </ul>	<ul style="list-style-type: none"> <li>• Advertising could be beneficial, but the association would need to resolve issues of conflict.</li> </ul>

Status 2006	Vision 2012	Benefits/Consequences	Constraints/Comments
<p>Our revenue is growing, but is insufficient to meet our goals.</p>	<p>Our revenue must continue to grow. We need enough revenue to support key initiatives.</p> <p>We need to develop training as a major source of revenue.</p> <p>We need to revise our dues structure. Other organizations are charging more for comparable membership services.</p> <p>The organizations should play a more significant role in funding the organization.</p>	<ul style="list-style-type: none"> <li>Without a clear revenue plan, we cannot fund the services that are needed.</li> </ul>	<ul style="list-style-type: none"> <li>The benefits of organizational membership is not clear, and not sufficient to justify the investment.</li> </ul>
<p>Our membership – about 456 members – is not large enough.</p>	<p>Our membership should reach 25% of the IG community at all levels. We think of a target of 2,500 to 5,000 members. Our growth is coming from the federal sector and the military.</p>	<ul style="list-style-type: none"> <li></li> </ul>	<ul style="list-style-type: none"> <li>We don't know how large the pool is.</li> <li>We are undecided about the extent of federal participation that we want. Is our mission state and local.</li> </ul>

Status 2006	Vision 2012	Benefits/Consequences	Constraints/Comments
<p>Training is a significant area of AIG activity, but the potential is great compared to what we do.</p> <p>But there are many staff members in many organizations who do not have basic training about the field.</p> <p>Less than a quarter of our members are certified.</p>	<p>We should have programs that are applicable to larger pools of employees.</p> <p>We should offer a basic training program that is recognized as the best way for new IG staff to become initially trained.</p> <p>Training should include both investigative and administrative staff.</p> <p>Training should be a more substantial source of revenue.</p> <p>A significant proportion of our membership should be certified.</p> <p>We need to work on the audit side.</p> <p>We should be able to deliver our training a localities so that agencies can participate without major travel expenses.</p> <p>We need to engage the chapters and the new members in determining the training that we should develop and offer.</p>	<ul style="list-style-type: none"> <li>• B: Certification is valued.</li> <li>• B: Training can be a significant source of revenue.</li> <li>• C: We need the revenue to function effectively.</li> <li>• C: Unless we reach out to students our membership will be less than it can be.</li> </ul>	<ul style="list-style-type: none"> <li>• There is a finite number of IGs and we can't increase that. The investigator and auditor pool is much larger.</li> <li>• The Certification programs are not providing much training.</li> <li>• Some auditors perceive that there is nothing unique about IG audits and that training from other sources is sufficient.</li> </ul>

Status 2006	Vision 2012	Benefits/Consequences	Constraints/Comments
<p>University relationships are not developed as envisioned. The original idea was that we could partner with a university and run a masters program that is related to certification. This has not happened.</p>		<ul style="list-style-type: none"> <li>• B: Students can be a source of new membership.</li> </ul>	<ul style="list-style-type: none"> <li>• We lack a clear idea about opportunities, costs and mutual expectations of the Association and the academic organizations we might work with.</li> </ul>
<p>We are the only organization that offers certification for IGs and for IG Investigators.</p>	<p>We need to consistently update what we offer, provide for examinations and assessment that validate what certification means.</p>	<ul style="list-style-type: none"> <li>• C: We might lose our unique role.</li> <li>• B: This can be a source of revenue.</li> <li>• B: This enhances our organization reputation.</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>

Status 2006	Vision 2012	Benefits/Consequences	Constraints/Comments
<p>We do not have an "Institute" that is appropriately organized and resources to provide the training and related programs that we seek to offer.</p> <p>We have relied on core members to "make it happen" for key activities such as the certification institutes.</p> <p>The current institute is a voluntary project, and it may not run as well as it should if it only relies on volunteers.</p>	<p>We should have an "Institute" that embodies our training and certification initiatives. It should be somewhat independent but accountable to AIG that provides the training.</p> <p>The volunteer approach does not seem to be capable of providing a test.</p> <p>The institutes depend too much on volunteers.</p> <p>There needs to be more structure in selecting, evaluating and developing the instructors.</p> <p>We need more structure in informing the instructors as to what is expected.</p>	<ul style="list-style-type: none"> <li>• B: Basic introductory training is a basic need that can be a large source of revenue.</li> </ul>	<ul style="list-style-type: none"> <li>• Certification should be the pinnacle of attainment, not the sign of basic training.</li> <li>• Volunteer instructors may not be able to invest the time and effort needed.</li> </ul>

Status 2006	Vision 2012	Benefits/Consequences	Constraints/Comments
<p>The administration of the organization is too ad hoc, reactive, with insufficient administrative resources. We may be too voluntary in our approach to basic functions.</p>	<p>The administration needs to be scaled to accomplish the identified duties of the Executive Director.</p> <p>The Executive Director position is a full-time position.</p> <p>Alternative visions are that the ED may contract out for certain of the administrative functions such as the newsletter and maintenance of memberships.</p> <p>Another vision is that the Executive Committee could act as an oversight committee over an organization that is contracted to serve as the secretariat.</p>	<ul style="list-style-type: none"> <li>• C: Members expect professional levels of organization management and will lose confidence in the organization if the problems are not addressed.</li> <li>• C: The current ED is not willing to continue the the current role. Services must be continued and transition must be smooth to avoid problems. Key services may be interrupted.</li> <li>• C: "If we don't have a full time executive director we'll never get to where we want to be."</li> <li>• C: Key volunteers may burn out. Some expected that volunteering for key activities would eventually transition to professional services.</li> </ul>	<ul style="list-style-type: none"> <li>• How do we afford to continue to professionalize our administrative model?</li> <li>• We lack a revenue plan that can support a full-time administrative office.</li> <li>• AIG offices are being stressed to do more with less.</li> <li>• New members may not be as prepared to volunteer because they think that the organization has more professional resources than we actually have.</li> <li>• Members are increasingly expected to take personal leave from their professional positions while they volunteer for AIG. This limits the availability of people to participate.</li> </ul>

Status 2006	Vision 2012	Benefits/Consequences	Constraints/Comments
<p>The governance of the organization is not functioning well. The Presidents cannot function in such an intensive administrative role. We lack consensus about the role of the Executive Director relative to the role of the President and the Board.</p> <p>Succession planning is not well-structured. The organization meeting limits the time availability to select executive committee members.</p> <p>We need to revise our Bylaws. They are complicated and they also need to reflect an election process that provides for a better succession process.</p> <p>We might need to designate a "Bylaws Committee" to come up with additional revisions and improvements.</p>	<p>There may need to be a strong Executive Director and a more ceremonial President.</p> <p>We need to re-envision the committee structure that reinforces the roles of chapters and makes assignments to the chapters for projects. This increases their sense of ownership in the national organization, and provides a new source of expertise for AIJ.</p> <p>We need a process to recruiting people who would be on the ballot.</p> <p>We should also have a "President Elect" who can prepare for leadership before being elected.</p> <p>We need to use the association committees as a source of people for Board positions, and as a way to demonstrate commitment and qualification for higher level of service.</p>	<ul style="list-style-type: none"> <li>• C: Critical work may not get accomplished.</li> <li>• C: Officers who are elected without being recruited means that when they take office they are not as committed to service as they could be.</li> <li>• B: Succession planning can improve the quality and preparation of organization leadership.</li> </ul>	<ul style="list-style-type: none"> <li>• We are faced with immediate problems that demand solutions now. But solving the immediate problems is not the same as solving the long-term problems.</li> <li>• Members do not necessarily like to be asked to vote for a "slate" that seems pre-selected.</li> <li>• Recruiting and screening takes time and the election process does not provide time.</li> </ul>

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Peer review. We have completed one review. No others are on the calendar. There have been some inquiries.	Peer review should be routine and rotating. Every IG organization should want this and AIJ should be perceived as the essential organization for this function.  The process should be appropriately resourced.  Preliminary review consultations should also be a part of the process.	<ul style="list-style-type: none"> <li>• B: This is an activity that can galvanize new members.</li> <li>• B: It can be a revenue source.</li> </ul>	<ul style="list-style-type: none"> <li>• The guidelines are new.</li> <li>• We don't know who has adopted the Green Book as the standards.</li> <li>• Can organizations pay for this?</li> <li>• Some perceive that this activity should not be part of the revenue stream. Others perceive that there are activities that the organization would have to undertake that have to be supported with funding.</li> <li>• Some offices don't think they can pass a peer review, so they don't want to engage in the process.</li> </ul>
The Green book is a major accomplishment that also galvanized the participants.	The Green book is continuously updated and is recognized as authoritative.	<ul style="list-style-type: none"> <li>• The Association benefits from the reputation of the standards.</li> <li>• The profession benefits from improved performance.</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>
New members are not oriented and are not asked to take on association activities.	We need to develop new initiatives and then involved the new members in these initiatives.	<ul style="list-style-type: none"> <li>•</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>

Status 2006	Vision 2012	Benefits/Consequences	Constraints/Comments
<p>Policies and procedures need development and improvement. We deal with procedure on an ad hoc basis. There is no guidance on a series of issues that need to be addressed.</p> <p>We need a structured manual.</p>		<ul style="list-style-type: none"> <li>• C: This limits our ability to delegate functions if we don't have clear policies.</li> </ul>	<ul style="list-style-type: none"> <li>•</li> </ul>

Status 2006	Vision 2012	Benefits/Consequences	Constraints/Comments
<p>The process of planning conferences needs improvement. We lack clear policy on certain topics.</p> <p>Our advanced planning is lacking.</p> <p>We depend too much on local volunteer participants. Sometimes this works really well and other times it is less successful.</p>	<p>Conferences should be planned by a committee. The conference venues should be planned well in advance. The committee should be more national, with less reliance, especially for program content, on the national level.</p> <p>There is a need for more professional participation. Hotel contracts can be very complex and professional participation may be critical.</p> <p>The national conference committee need to have clearer authority. The central committee should organize the program, while the host committee handles the local arrangements and can propose speakers and participants.</p> <p>The themes for the conferences should be identified well in advance – 2 years ahead of time. These decisions should be made at the planning stage.</p> <p>Conferences should not duplicate prior conferences.</p> <p>The roles and authority of the national and local committees needs to be clearly defined.</p>	<ul style="list-style-type: none"> <li>• C: If a conference fails, it has serious negative consequences for future attendance and for the reputation of the organization.</li> <li>• C: Conflict about conference planning is demoralizing for the participants.</li> <li>• C: A poorly planned and conceptualized program can impair attendance.</li> <li>• B: A well-conceived program can attract more registrations.</li> </ul>	<ul style="list-style-type: none"> <li>• We don't know whether our rate structure optimizes our revenues.</li> <li>• There is disagreement about the consequences of two conferences per year.</li> <li>• Reliance on local committees to plan the conferences is problematic.</li> <li>• Communication is difficult between conferences.</li> <li>• Some venues attract more registrations than others because of attributes of the venue.</li> <li>• Changes in local leadership can complicate local leadership.</li> </ul>