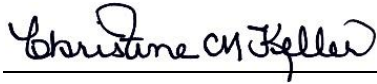


Monitoring Report II: Treatment of Stakeholders

This Monitoring Report was approved by the AIR Board of Directors on September 19, 2025. The entire report is for internal use only. Do not duplicate or distribute without the express written approval of the Association for Institutional Research. Copyright 2025.

I certify that the information contained in this report is true.



Christine M Keller, Executive Director & CEO

August 29, 2025

Date

The information and data contained in this report cover the period August 2024 to July 2025 unless otherwise noted. Stakeholders are individuals who interact with AIR and access its information, products, or services. Members are a subgroup of stakeholders with special rights, privileges, and/or benefits (EL II, Policies H & I).

Global Policy Language

With respect to interactions with stakeholders, the Executive Director will not cause or allow conditions, procedures, or decisions that are unsafe, undignified, or unnecessarily intrusive.

Interpretation 1

AIR will establish and communicate clear expectations for professional conduct and mutual respect to ensure that all association activities, events, and communications occur in safe and respectful environments. These expectations will include appropriate consequences for violations.

Evidence 1

- AIR maintains and enforces conduct expectations in alignment with American Society of Association Executives (ASAE) guidance and best practices for associations:
 - **Event Participation:** Registrants for all AIR events agree to the [Event Terms and Conditions](#), which include AIR's code of conduct and how to report unacceptable behavior. No violations were reported to AIR staff during the reporting period, including at the 2025 AIR Forum - [Forum Terms and Conditions](#).
 - **Online Engagement (AIR Hub).** Community Participation Guidelines are in place and agreed to by all users. Moderation processes are in effect, including pre-review of first-time posts and a streamlined mechanism to flag and remove non-compliant content. [Community Participation Guidelines](#).
 - **Organizational Standards:** These safeguards support positive stakeholder experiences and reduce legal risk while reinforcing AIR's commitment to respectful, professional engagement.

Compliance 1

I report compliance with Global Policy, interpretation 1.

Interpretation 2

The interpretations and evidence for Policies A to I reasonably demonstrate that stakeholders (including members) are not subjected to conditions, procedures, or decisions that are unsafe, undignified, or unnecessarily intrusive.

Evidence 2

Evidence is provided within Policies A to I later in this report.

Compliance 2

I report compliance with Global Policy, interpretation 2.

A. Policy Language

The Executive Director will not: Elicit information for which there is no clear necessity.

Interpretation 1

AIR will publicly disclose what information is requested from stakeholders, how it is used, and the privacy/security protections in place.

Evidence 1

The AIR [privacy policy](#) outlines protocols for the data requested, its use, and how/when it may be shared. The privacy policy was reviewed and updated in 2024.

Compliance 1

I report compliance with Policy A, interpretation 1.

Interpretation 2

AIR will establish and follow guidelines for stakeholder information requests, including criteria for selecting recipients, limits on frequency, and consideration of the value of the information collected for AIR's operations, stakeholders, and the field.

Evidence 2

AIR actively monitors the volume and frequency of information requests to ensure they are targeted, limited, and valuable:

- **Request Management:** Stakeholder outreach is planned with attention to relevance, necessity, and timing to minimize burden.
- **Survey Limit:** Individuals are limited to no more than four research survey requests per year, except under special circumstances.
- **2024–2025 Status:** No individual received more than four requests during the reporting period.

This practice helps balance AIR's data needs with respect for stakeholders' time and capacity.

Compliance 2

I report compliance with Policy A, interpretation 2.

B. Policy Language

The Executive Director will not: Use methods of collecting, reviewing, transmitting, or storing stakeholder information that fails to protect against improper access to the material elicited.

Interpretation 1

To protect stakeholder financial and personal information from improper access, AIR will:

- Maintain a bank-operated payment process for mailed checks.
- Ensure uninterrupted HTTPS security certification on AIR servers that handle financial transactions.
- Use tokenization for all credit card processing to prevent storage of card data.
- Train staff handling payments on protocols prohibiting electronic storage or transmission of sensitive information (e.g., credit card or Social Security numbers).

Evidence 1

- **Bank Processing:** A dedicated, bank-managed post office box was maintained throughout the reporting period.
- **Secure Transactions:** No expired HTTPS certificates were reported on servers handling financial transactions.
- **Tokenization:** AIR used third-party processors for all credit card transactions, with no gaps. Credit card data is never collected via phone or email.
- **Staff Training:** Payment handling procedures are documented and reviewed annually. The sensitive information policy was reviewed with relevant staff in January 2025.
- **Social Security Numbers:** Only collected from stakeholders receiving payment for services rendered (e.g., contractors). Protection of this information is covered under Executive Limitation Policy II – Treatment of Staff.

Compliance 1

I report compliance with Policy B, interpretation 1

Interpretation 2

To protect stakeholder directory information, AIR will use secure systems and established protocols, including:

- Restricting access to the member directory to current members via login credentials. Individual members (excluding organizational membership administrators) may opt out of directory participation.
- Prohibiting the sale or distribution of member directory data to commercial entities.

Evidence 2

- No breaches of stakeholder information, including member directory data, occurred during the reporting period.
- No reports of inappropriate use or unauthorized access to directory information were received.
- No directory information was sold or shared with commercial entities.

Compliance 2

I report compliance with Policy B, interpretation 2.

C. Policy Language

The Executive Director will not: Fail to provide access to information, products, or services through appropriate accommodations for stakeholders with disabilities.

Interpretation 1

AIR's educational content will provide alternative access options for stakeholders with disabilities and follow accessibility best practices, including alignment with WCAG 2.0 standards for web content.

Evidence 1

- AIR's educational content meets baseline accessibility standards, including alignment with WCAG 2.0 guidelines, and alternative access options are offered upon request.
- Accessibility is embedded into new content development, with attention to emerging tools and inclusive practices.
- Closed captioning is a standard feature for virtual trainings, including: PEDS and PDP workshops, Data Literacy Institute tutorials, Foundations workshops, and LEADs virtual events.
- IPEDS tutorials include closed captioning and ADA-compliant transcripts, which are published on each tutorial's webpage.

Compliance 1

I report compliance with Policy C interpretation 1.

Interpretation 2

AIR will ensure that in-person events meet ADA requirements by proactively soliciting accommodation requests during registration and responding individually to each request.

Evidence 2

- The registration process for in-person events includes a prompt for attendees to request ADA accommodations.
- Each request is reviewed and followed up individually by AIR staff to ensure appropriate support.

2025 AIR Forum

- Three attendees requested accommodations via the registration form. Each was contacted individually, and accommodations were either provided or clarified in consultation with the requestor.
- Wordly AI-based captioning and translation was available for keynotes, impact sessions, and 20 featured sessions, offering real-time captioning and translation into 50+ languages.

2025 LEADs Seminar

- No accommodation requests were received.

Compliance 2

I report compliance with Policy C, interpretation 2.

Interpretation 3

AIR will ensure virtual events meet ADA requirements by offering participants the opportunity to request accommodations and by proactively applying accessibility features.

Evidence 3

- All virtual event registration forms prompt attendees to indicate accommodation needs. Any requests are followed up individually by AIR staff.
- **No accommodation requests** were submitted for the following 2025 virtual offerings:
 - Foundations Workshops
 - PDP Workshops
 - IPEDS Workshops
 - Holistic Course
 - LEADs virtual events
- **Data Literacy Institute (DLI)**: Closed captioning was improved in spring 2025 following participant feedback.
- **LEADs virtual sessions**: Closed captioning is standard practice and does not require a separate request.

Compliance 3

I report compliance with Policy C, interpretation 3.

D. Policy Language

The Executive Director will not: Allow stakeholders to be unaware of what may be expected and what may not be expected from services.

Interpretation

Stakeholders must be able to make informed decisions about participating in AIR's services. To support this, AIR will ensure that:

- Educational offerings clearly describe content, expectations, fees, and policies.
- Sponsors receive information on timelines, benefits, and key contacts.
- Fees are transparently displayed for all paid activities.
- Membership pages outline benefits and pricing options.
- Contact information for the Executive Director is easy to find for questions or concerns.

Evidence

AIR stakeholders are provided with clear expectations for participation, purchase, and engagement. The following examples demonstrate the accessibility and clarity of this information.

a) Educational and Training Opportunities. AIR's public-facing webpages describe content, costs, participation requirements, timelines, and cancellation policies:

- [Professional Development & Training Landing Page](#)
- [IPEDS Training](#)
- [Course Catalog](#)
- [Cancellation Policies](#)
- [Event Terms and Conditions](#)

b) Forum Sponsors. Sponsorship details were shared directly with prospective sponsors and posted to the 2025 Forum website, including timelines, contact information, and benefit descriptions.

c) Activities Requiring Fees. Registration fees are transparently presented on relevant education and training webpages (as listed above), in promotional emails, and during the registration process.

d) AIR Membership Information. AIR's membership pages describe benefits and pricing for individual and organizational members:

- [Organizational Membership](#)
- [Individual Membership](#)

e) Executive Director Contact Information. Contact details for the Executive Director are easily accessible on key pages:

- [AIR Staff Directory](#)
- [Treatment of Stakeholders Policy Page](#)

Compliance

I report compliance for Policy D.

E. Policy Language

The Executive Director will not: Leave stakeholders uninformed of this policy, or without a way to be heard for persons who believe they have not been accorded a reasonable interpretation of their protections under this policy.

Interpretation

Stakeholders must be aware of the Treatment of Stakeholders Policy and have a clear, accessible way to raise concerns if they believe their protections have been compromised. The policy will be linked in the website footer and include contact information for the Executive Director.

Evidence

- The AIR website footer links to the [Treatment of Stakeholders Policy](#) webpage, which includes contact information for the executive director.
- No inquiries regarding the policy were received by the Executive Director during the reporting period.
- The policy will be highlighted and linked in the September 2025 issue of eAIR, reaching 15,000+ stakeholders.
- The policy will be referenced in the footer of multiple promotional emails in late August and early September 2025.

Compliance

I report compliance with Policy E.

F. Policy Language

The Executive Director will not: Discriminate in opportunities, activities, or practices because of age, mental or physical disability, genetic information, ethnic or national origin, race, color, religion, sex, sexual orientation, gender identity, transgender, marital status, pregnancy, veteran status, or any other protected classifications.

Interpretation 1

AIR will ensure a welcoming, inclusive environment for all stakeholders by establishing clear expectations for professional behavior, mutual respect, and full participation across association activities and events. These expectations will be communicated in advance and supported by systems for reporting and addressing violations.

Evidence 1

- **Terms and Conditions:** Registration for AIR-sponsored events, including the AIR Forum, requires agreement to [Terms and Conditions](#) that include a code of conduct and expectations for inclusive, respectful engagement. No violations were reported during the reporting period.
- **AIR Forum Community Commitments**
 - The 2025 AIR Forum opened with a land acknowledgment and a \$1,275 contribution to the First Nations Development Institute.
 - A matching \$1,275 donation supported the Tangelo Park Program, a local educational initiative in the host community.

- **AIR Hub Online Community.** Users must agree to the [Community Participation Guidelines](#). First-time posts are moderated, and a clear process is in place for flagging and removing content that violates the guidelines.

Compliance 1

I report compliance for Policy F, interpretation 1.

Interpretation 2

AIR will prioritize including an array of diverse perspectives—including professional backgrounds, institutional types, personal characteristics, and lived experiences—when selecting Executive Office advisory group members, event speakers, and instructional personnel (e.g., educators, facilitators, mentors).

Evidence 2

- **Executive Office Advisory Groups.** As noted in the [March 2025 incidental report](#), advisory group membership reflects a range of institutional affiliations, roles, and perspectives.
- **Event and Course Programming.** AIR programming—including Forum keynotes—has consistently featured speakers across diverse identities (e.g., race/ethnicity, gender, national origin) and professional backgrounds over the past eight years.

Compliance 2

I report compliance for Policy F, interpretation 2.

G. Policy Language

The Executive Director will not: Treat stakeholders in a manner that does not align with commonly accepted business practices.

Interpretation 1

AIR's technology infrastructure will be maintained and updated to support standard business practices and enable staff to deliver reliable and responsive customer service.

Evidence 1

- **Business Systems:** AIR's association management system and website form a stable backbone for core services. In 2025, enhancements were made to the user dashboard to better reflect organizational membership status in MyAIR.
- **System Performance:** Website and system uptime exceeded 99%, with downtime limited to scheduled maintenance. Reliability is supported by redundant data center systems.
- **Stakeholder Satisfaction:** In 2025, 95% of Forum evaluation respondents were satisfied with the online registration process (up from 92% in 2024).

Compliance 1

I report compliance with Policy G, interpretation 1.

Interpretation 2

AIR will regularly assess stakeholder perceptions of its services, programs, and value through biennial surveys and targeted evaluations.

Evidence 2

- **2025 Stakeholder Survey:** AIR's third comprehensive stakeholder survey (857 responses) found:
 - 74% rated the value of AIR offerings as very good or excellent; 21% rated it as good.
 - 89% would recommend AIR to a colleague; professional development was the top reason for membership.
- **Opportunities for Building Awareness:** Two-thirds of respondents were unfamiliar with key offerings like Holistic IR, LEADs, and Data Literacy courses, highlighting areas for increased visibility.

Compliance 2

I report compliance with Policy G, interpretation 2.

H. Policy Language

The Executive Director will not: For those stakeholders who are members, cause or allow the inhibition of their participation, as appropriate, in Association functioning.

Interpretation 1

AIR will offer diverse, meaningful opportunities for members to participate in and contribute to the association's work.

Evidence 1

Note: The following figures demonstrate that member participation is not inhibited; they are not presented as targets or benchmarks.

- **Online Community Engagement.** The AIR Hub platform remains open to all stakeholders, including members, with 7,619 community members as of July 2025—an increase of over one-third from 2024. Discussion posts increased by over 40%, totaling 12,418.
- **Volunteer Roles.** Members contribute to AIR's work through a variety of roles:
 - 40 served on 2025 Forum advisory groups
 - 235 reviewed Forum proposals
 - 10 served as peer reviewers (awards, publications, scholarships, etc.)
 - 9 served on the 2025 eAIR Editorial Committee
- **Content Contributions.** Members continue to shape the association's intellectual and professional resources:
 - 309 members presented sessions at the 2025 Forum
 - Three [AIR Professional File](#) volumes were published since July 2024, including a special issue on inclusive data systems
 - The eAIR newsletter regularly features member-submitted content (articles, opinion pieces, tech tips)

Compliance 1

I report compliance with Policy H, interpretation 1.

Interpretation 2

The Executive Office will support the nominations and elections process such that the Nominations and Elections Committee (NEC) can annually certify the election as fair and compliant with AIR's Constitution and Bylaws.

Evidence 2

(Note: While the Board holds ultimate responsibility for election integrity, it has delegated process support to the Executive Director.)

- The NEC certified the 2025–2026 election results on March 5, 2025.
- Voting statistics for the 2025-2026 elections were as follows.

2025-2026 Election Statistics	
Ballots Sent: Individual Members	1,413
Ballots Sent: Organizational Member Voting Delegates	326
Ballots Counted: Individual Members	205 sent
Ballots Counted: Organizational Member Voting Delegates	88 (representing 1,780 members)
Total Votes	293
<i>Voting Period</i>	<i>February 3-28, 2025</i>

Compliance 2

I report compliance with Policy H, interpretation 2.

I. Policy Language

The Executive Director will not: For those stakeholders who are members, cause them to be unaware of the membership categories, dues, voting privileges, and access to Association services.

Interpretation 1

AIR will ensure that information on membership categories, dues, and benefits is clearly presented and accessible via the AIR website and within the join and renewal processes.

Evidence 1

- Membership categories and costs: <https://www.airweb.org/about-air/membership/dues>
- Member benefits: <https://www.airweb.org/membership/benefits>

Compliance 1

I report compliance with Policy I, interpretation 1.

Interpretation 2

AIR members will receive multiple, targeted communications regarding the nominations and elections process, in alignment with their communication preferences.

Evidence 2¹

- Five nomination emails (21,426 total sends) achieved an average open rate of 47.1% and a click-through rate of 13.6%.
- Five election emails (7,216 total sends) achieved an average open rate of 56.8% and a click-through rate of 23.7%. One email was targeted specifically to organizational membership voting delegates.

Compliance 2

I report compliance with Policy I, interpretation 2.

Interpretation 3

Members will receive targeted, opt-in communications promoting key AIR programs and benefits to support awareness and engagement.

Evidence 3²

- **AIR Forum Promotion:** 43 emails tailored to audience and interest (513,707 total sends) had an average open rate of 41.9% and a click-through rate of 15.8%.
- **Membership Renewal Campaign:** A six-email automation campaign starts 60 days before a member's renewal date. These emails average a 50.0% open rate and a 34.9% click-through rate.

Compliance 3

I report compliance with Policy I, interpretation 3.

^{1 2}For context, the 2024 nonprofit average open rate is 35.6% and the click-through rate is 3.7% (2024 *Higher Logic Benchmarking Report*).