

National Council on Measurement In Education

Policies and Practices Handbook

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7. Financial Policies and Procedures

7.1 Policies and Procedures

1. The articles of incorporation contain specifications for distribution of assets in the case of corporate dissolution.
2. The Bylaws (effective September 23, 1978) contain specifications with respect to financial policies and procedures:
 - a. Article IV, Section 1, 5, and 6
 - b. Article VI
 - c. Article VII

The Bylaws are presented in Section 2.1 of this Handbook.

3. NCME is recognized as a nonprofit organization by the Internal Revenue Service according to Code #501, Section C-3. At the end of each fiscal year, the Executive Director (central office) files the required form 990NP for the Corporation.
4. In accord with the Bylaws (Article VII, Section 4), the Executive Director is to be bonded. The Board has determined that only the NCME Executive Director and staff are authorized to receive and disburse NCME monies.
5. The Board authorizes expenditures through the budget process.
6. Various NCME officers, committee chairs, project directors, editors, as well as the Executive Director, are authorized to spend or encumber NCME monies. The budget for the year, as approved by the NCME Board, is the “authorization” to spend or encumber. The committee chair, or the special project director, is responsible for ensuring that needed funding is included in NCME’s budget. Editors are likewise responsible for managing their expenses.
7. NCME’s fiscal year extends from January 1 through December 31. Until 1979 its fiscal year was the calendar year. At the fall 1979 Board meeting, it was decided to make the fiscal year run from July 1 to June 30. In the fall of 2006 the Board decided to return to using the calendar year as its fiscal year. Ordinarily, the committee budget, the budget(s) for special projects, and the Annual Meeting budget pertain to the fiscal year.
8. Any NCME member responsible for a budget may not spend or encumber in excess of the budget. Requests to have more funding made available should be directed to the Board or Executive Director.
9. All invoices or requests for reimbursement should be signed by the person responsible for the budget and forwarded to the Executive Director promptly for payment. Ordinarily, requests for reimbursement should be submitted on NCME reimbursement forms with appropriate receipts (or photocopies) attached. In every case, the request to pay or reimburse should indicate the proper budget to be charged. A copy of NCME’s travel policies is provided in Section 7.3.
10. In accordance with the Bylaws, a certified public accountant will review the accounts at the

end of the fiscal year. The report, the income and the expenditures for the fiscal year ended, and the net worth statement for the beginning and end of the same fiscal year will be reported as soon as possible to the Budget and Finance Committee.

7.2 Travel Policies

Following is a listing of NCME's travel policies for Board meetings.

- Meeting sites must be selected to minimize the overall costs (e.g., travel distances, ground transportation, and hotel accommodations).
- Travel should not be for a distance greater than a round trip from an individual's residence or institution to the NCME activity.
- Individuals must secure airline fares that take advantage of savings
- Airline tickets can be purchased by the central office or NCME's designated travel service.
- Hotel accommodations should normally be made by central office or NCME's designated travel service. Room and tax will usually be billed to a master account.
- Travel by personal auto is reimbursable at the IRS standard rate for deductible uses of depreciated automobiles. To determine current reimbursement amount, go to the IRS website at <http://www.irs.gov/index.html> and key search "IRS standard mileage rates [year]."
- Air travel is restricted to coach class.
- Individuals are urged, when feasible, to use reasonably priced ground transportation between hotels, airports, residences, or institutions.
- Expenses incurred by NCME governance members when attending the Annual Meeting and its associated meetings are not reimbursable. This includes travel, hotel, meal, and transportation expenses.
- If travel to the NCME activity is coupled with other business or pleasure, it is expected that the cost will be prorated appropriately. Similarly, if a trip provides for a stopover, the fare should be prorated. Please indicate the amount of such a credit.
- Incidental expenses of a personal nature (entertainment, bar bills, phone calls, laundry, etc.) are not reimbursable.
- An advance against expenses can be requested by submitting this form to the central office. An accounting must be rendered after the activity.
- See Appendix F for expense reimbursement form.

7.3 Unbudgeted Expense Policy

In August, 2008, the Board approved the following policy on unbudgeted expenses.

All requests for unbudgeted expenditures must be submitted in writing to the Executive Director. A request for an expenditure of less than \$1000.00 in a fiscal year must be approved by the President. If the request is greater than or equal to \$1000.00 in a fiscal year, the request should include a rationale. The Executive Director will forward the request to the chair of NCME's Budget and Finance Committee for review and a written recommendation. The request and recommendation then are sent to the President.

When the request is greater than or equal to \$1000.00, the President submits the request to the NCME Board or the Executive Committee for review and approval. The recommendation of the chair of NCME's Budget and Finance Committee should also be provided to the Board or the Executive Committee.

7.4 Reserve Policy

The following policy defining NCME's reserve fund was approved by the Board of Directors at its July, 2010 meeting.

The primary objective of NCME's reserve funds is to sustain the organization in the event of unbudgeted and unexpected expenses and/or loss of revenues. Funds in excess of these reserves may be used to support planned projects and activities. It is expected that under normal circumstances, the membership dues, annual meeting revenue, and publication royalties and revenue will cover normal annual operating expenses.

To meet its objective, the reserve fund should provide protection for one year of operating expenses. The Budget and Finance Committee should use the previous year's expenses plus or minus 20 percent as the amount for the funds that are to be defined as operating. These values should be reviewed and approved by the Board of Directors.

Subsequently, each year, the Budget and Finance Committee should compare the budgeted expenses for the year to the range stated above. If these expenses fall within the range, then no revision in the size of the reserve funds is needed. If the budgeted expenses fall outside this range, then the Budget and Finance Committee should submit to the Board for review and approval an appropriate revision in the size of the operating reserves and range values.

7.5 Policy on the Use of Returns from the Portfolio

The following policy was approved by the Board at its July, 2011, meeting:

1. Annual returns over and above the value of the assets retained to keep up with inflation should be made available to fund special projects as needed during the next fiscal year.
2. Annual returns should not be used to fund everyday operating expenses of NCME. As

noted in the section of the investment policy (see Section 7.6), revenues from operational activities such as the annual meeting, journal subscriptions, and the like meeting and membership dues should cover the everyday operating expenses of running NCME.

7.6 Investment Policy

The following policy was approved by the NCME Board on April 9, 2007

Purpose

The purpose is to identify a set of investment objectives and constraints, asset allocation parameters, performance measurement benchmarks, and guidelines for the NCME's long-term and short-term investments. This investment policy statement is intended to assure the officers, Executive Committee, and Board of Directors that reserve assets are being invested in accordance with the best interests of NCME, given the following considerations:

- NCME's risk tolerance or its willingness to withstand substantial losses due to adverse market conditions.
- NCME's need to obtain real (inflation-adjusted) growth in its asset base.
- NCME's requirement for current income to support NCME programs and activities.
- NCME's liquidity requirements or its need to maintain adequate cash balances to accommodate withdrawals from the long-term portfolio when needed.

Objectives

The primary objective of having reserve funds is to provide continuity in the programs set out in the NCME strategic plan, regardless of short-term financial discontinuities and disruptions. With this objective, the reserve funds must (1) provide protection for biennial operating expense, (2) provide for periodic, planned extraordinary expenses (such as moving the central office or implementing a new publication program), (3) provide for extraordinary expenses in connection with the annual meetings, and (4) provide support for any endowed programs the organization may decide to create. It is expected that under normal circumstances, the membership dues, annual meeting revenue, and publication royalties and revenue will cover normal annual operating expenses.

To meet its objective, the reserve fund should provide protection for approximately one year of operating expenses. The Budget and Finance Committee should propose a target amount for the funds that are to be defined as operating reserves and establish a range around this target. These values should be reviewed and approved by the Board of Directors.

Subsequently, each year, the Budget and Finance Committee should compare the budgeted expenses for the year to target. If these expenses fall within target plus 20 percent then no revision in the size of the reserve funds is needed. If the budgeted expenses are above the target plus 20 percent, then the Budget and Finance Committee should submit to the Board for review and approval an appropriate revision in the size of the operating reserves. The operating reserves should be invested in accord with the objectives, constraints, parameters, benchmarks, and guidelines specified by NCME's Investment Policy. The reserves may be integrated with NCME's existing investment funds; a separate investment fund is not required.

Risk Tolerance

The risk tolerance of the organization should be viewed as moderately conservative. Some volatility in the fund's returns can be tolerated, provided there are reasonable expectations that the fund will achieve its desired return over the long term. The reserve portfolio will not be structured to incur unnecessary risk. On an overall portfolio basis, risk will be controlled through the use of more than one asset class as well as through a regional distribution of investments throughout the world, consistent with the investment objectives. To help define what is meant here by "moderately conservative", this policy incorporates the following two statements:

1. The NCME Board of Directors recognizes that higher returns involve volatility and is willing to tolerate declines in the value of this portfolio of up to 15% in a given year.
2. The NCME Board would accept losses as often as two out of 10 consecutive years to achieve higher long-term returns.

These statements are intended to aid in understanding the Board's risk tolerance and are not intended to be limitations on actual results or benchmarks that should trigger specific action.

Constraints

The liquidity requirements of the reserve funds portfolio are minimal. At least 2% of these funds must be available on short notice (30 days) for conversion into liquid assets without significant penalty.

For cash amounts maintained and accessed by the central office for satisfying budgeted operating expenses, the balance should be monitored so that no more than the budgeted expenses for the current fiscal year are in cash accounts. Cash in excess of this amount should be moved to the investment portfolio periodically by the NCME central office accountant.

Since NCME's 501 (3) tax-exempt status extends to the reserve funds, tax considerations are not a constraint in the management of this investment fund.

Academic research suggests that the decision to allocate total assets among various asset classes will far outweigh security selection and other decisions that impact portfolio performance. After reviewing the long-term performance and risk characteristics of various asset classes and balancing the risk and rewards of market behavior, the asset classes shown in Table 1 were selected to achieve the objectives of the NCME's portfolio.

It should be recognized that when the Portfolio invests in common investment pools, including mutual funds, the actual weightings of the investments within these common investment pools can and will vary. Further, no guarantees can be given about future performance, and this Investment Policy Statement should not be construed as offering such a guarantee.

Asset Allocation

The following allocations were approved by the Board of Directors at its August, 2013, meeting.

Sector	Holdings	Percentages	
		Target	Range
Fixed Income	Overall	60%	50-70%
	Cash & cash equivalents	15%	10-20%
	High grade corporate bonds Treasuries Asset-backed	} 45%	40-50%
Stocks	Overall	40%	30-50%
	Large Cap	25%	20-30%
	Small/Mid Cap	10%	8-13%
	International	5%	2-7%

Permitted Assets and Investments

Investment of NCME's funds should be limited to individual marketable securities or common investment pools (for example, mutual funds or unit investment trusts) in the following categories:

Permitted Asset Classes

1. Cash and cash equivalents
2. Fixed Income–Domestic Bonds
3. Equities–U.S.
4. Equities–Non-U.S.
5. Equities–REITs (Real Estate Investment Trusts)
6. Mortgage funds

Permitted Security Types

1. Mutual Funds–Stocks, Bonds, Money Market Funds
2. Individual Stocks, as long as they are traded on the New York, American or NASDAQ Stock Exchanges
3. Individual Bonds or Notes, as long as they are rated A or better and traded on a major U.S. exchange
4. Individual U.S. Treasury or Government Agency Bonds or Notes
5. Bank Certificates of Deposit, Commercial Paper, Repurchase Agreements and similar short-term investments

Prohibited Asset Classes and/or Security Types

Investment of the portfolio shall not include direct investment in the following asset classes or security types:

1. Precious metals
2. Short sales
3. Purchases of Letter Stock, Private Placements, or direct payments
4. Leveraged Transactions
5. Commodities Transactions
6. Puts, calls, straddles, derivatives, or other option strategies
7. Purchases of real estate, with the exception of REITs

Investment in common investment pools which do or may invest in the prohibited asset classes or security types is permitted, so long as investment in the prohibited asset classes or security types does not comprise a substantial portion (i.e., 25% or more) of the common investment pool's investment activity.

Other Investment Considerations

Due to NCME's relatively long-term investment horizon and moderately conservative risk tolerance, up to 5% of the assets under this Investment Policy Statement can be invested in illiquid, long-term investments. Individual bond maturities should average no more than 10 years. No more than 20% of the bonds in the portfolio should have maturities of greater than 20 years at any time.

No individual stock or bond should represent more than 5% of the portfolio value. No single fund should represent more than 20% of the portfolio value.

Updated Allocations

From time to time, it may be desirable to amend the basic allocation policy or calculations. When such changes are made, updates will be attached to this Investment Policy Statement as an appendix and will be considered part of this Investment Policy Statement.

From time to time, market conditions may cause the Portfolio's investment in various asset classes to vary from the established allocation. To remain consistent with the asset allocation guidelines established by this Investment Policy Statement, at least every six months NCME's Financial Advisor should review the portfolio and each asset class in which the Portfolio is invested. If the actual weighting differs from the target weighting by 10% or more (e.g., from a recommended 15% to less than 5%, or more than 25% of total assets) the Advisor should consider rebalancing the portfolio back to the recommended weighting. If the actual weighting differs from the target weighting by 10% or more for four consecutive quarters, the Advisor should rebalance the portfolio back to the recommended weighting.

The NCME Finance Committee will review the target asset allocation every year and make recommendations to the Board of Directors on its continuing appropriateness or suggested modifications.

Performance Benchmarks: Cash Equivalent Vehicles

Cash equivalent investments should be United States treasury bills, bank certificates of deposit, commercial paper, repurchase agreements, and similar short-term investments. Generally, cash equivalent investments should be made through investment vehicles, such as money market funds, where the fund's share price is intended to remain constant and the fund's yield is comparable with the current risk-free rate of return.

The following criteria will be used for selecting and retaining any common investment pools serving as a Cash Equivalent investment:

1. The fund will have an investment track record of no less than three years.
2. The funds' average annualized yield, net of fund level expenses, over a three-year period will be no less than 0.5% below that of the average of all other funds sharing a similar investment objective for an equivalent period.

NCME's Financial Advisor will review the performance of each Cash Equivalent vehicle on a semiannual basis. The investment vehicle's total returns will be compared with the average returns for all other cash equivalent funds with a similar investment objective for the previous one-, three- and five-year periods.

In the event a selected fund underperforms the returns established by such averages by more than 0.5% for the prior two-year period, such fund(s) will be placed on probation for the subsequent 12 months. If over the subsequent one-year period the fund's average annual return remains 0.5% below that earned by the applicable average, the Advisor will make a determination as to whether the fund continues to be a prudent and appropriate investment.

Equities

Any selected Common Stock Funds should be common investment pools, such as a publicly traded open or closed-end mutual fund, providing asset valuations at least monthly. Such investments may include focus on any size domestic or non-U.S. stock.

The following criteria will be used for the selection and retention of any common stock investment vehicles:

1. The fund will have an investment track record of no less than three years.
2. The fund's average annualized returns net of expenses, over a three year time period or more, will be no less than 20% below the average returns for equivalent common investment pools sharing the same investment objective.
3. The fund will incur investment risk no more than 20% above that incurred by publicly traded funds with the same investment objective, as measured by the fund's standard deviation.

Equity Performance Benchmarks. NCME's Financial Advisor will review each fund's total returns compared with the appropriate benchmark listed below for the previous three-, five- and ten-year periods.

- a. Large-Cap (> \$10 billion) investments will be measured against the S&P 500 index.
- b. Mid-Cap (\$1 to 10 billion) investments will be measured against the S&P 400 Mid-Cap.

- c. Small-Cap (\$500 million to 3 billion) investments will be measured against the Russell 2000 index.
- d. International investments will be measured against the MSCI EAFE index.
- e. Broad equity market portfolios will be measured against the Wilshire 3000 index.

In the event any selected fund underperforms the applicable benchmarks for a period of two years, the selected fund will be placed on probation for the subsequent 12 months. If over the subsequent year the fund's average return for the applicable two-year period remains below that earned by the benchmark sharing the same investment objective, the Financial Advisor will make a determination as to whether the fund continues to be a prudent and appropriate investment.

The relative risk of the selected investment vehicle will also be reviewed on a quarterly basis, as measured by the fund's standard deviation, over the most recent one-, three-, and five-year periods. The fund's relative risk is to be calculated by independent fund evaluation services such as Lipper Analytical Services, Inc. or Morningstar, Inc. or provided by the fund manager in compliance with Chartered Financial Analyst Institute (CFAI) performance presentation standards.

In the event the level of risk assumed by the fund exceeds that incurred by the average for equivalent common investment pools sharing the same investment objectives by more than 20% over the previous three-year period, the Financial Advisor will make a determination as to whether the fund continues to be a prudent and appropriate investment.

Bonds and Other Fixed Income Vehicles

Any selected diversified bond fund shall be a common investment pool, such as a publicly traded mutual fund, providing net asset valuations published on a monthly basis.

The following criteria will be used for the selection and retention of such diversified bond funds:

1. The fund will have an investment track record of no less than three years.
2. The fund's average annualized returns net of fund level expenses, over a three- year time period or more, will be no less than 20% below the average returns for equivalent common investment pools sharing the same investment objective.
3. The fund will incur investment risk no more than 20% above that incurred by publicly traded funds with the same investment objective, as measured by the fund's standard deviation.
4. The fund will invest in no fewer than twenty income-producing securities representing at least twenty corporate issuers or a comparable number of securities backed by the full faith and credit of the U.S. government, or one of its agencies, or a combination thereof.

Fixed Income Performance Benchmarks. NCME's Financial Advisor will review each fund's total returns compared with the appropriate benchmark listed below for the previous three-, five- and ten-year periods.

- a) Intermediate (3-10 year duration) will be measured against the Lehman Brothers Intermediate Government Corporate index
- b) Broad fixed income portfolios will be measured against the Lehman Brothers Aggregate index

In the event any selected fund underperforms the applicable benchmarks for a period of two years, the selected fund will be placed on probation for the subsequent 12 months. If over the subsequent year the fund's average return for the applicable three-year period remains below that earned by the benchmark sharing the same investment objective, the NCME Financial Advisor will make a determination as to whether the fund continues to be a prudent and appropriate investment.

The relative risk of the selected investment vehicle will also be reviewed by the Advisor on a semiannual basis, as measured by the fund's standard deviation, over the most recent one-, three-, and five-year periods. The fund's relative risk is to be calculated by independent fund evaluation services such as Lipper Analytical Services, Inc. or Morningstar, Inc.

Balanced Funds/Managers

NCME may determine that it is desirable to employ the use of one or more Balanced Funds, which should be common investment pools, such as a publicly traded mutual fund, and which publishes net asset valuations on a daily basis.

The following criteria will be used for selecting and retaining investment vehicles serving as Balanced Funds:

1. The fund should have at least a three-year track record.
2. The fund's average annualized return, net of fund level expenses, over a three- year time period or more, should be no less than 2% below the returns generated by the average balanced fund as compiled by Lehman Brothers, Standard & Poors, or Morningstar, Inc.
3. The fund will incur investment risk no more than 20% above that incurred by publicly traded funds with the same investment objective, as measured by the fund's standard deviation.
4. No less than 20% of the fund's assets should be invested in U.S. government securities or investment grade corporate bonds, or a combination thereof, at all times.

NCME's Financial Advisor will review the performance of each balanced fund on a semiannual basis.

In the event any selected fund underperforms the applicable averages for a period of two years, the selected fund will be placed on probation for the subsequent 12 months. If over the subsequent year the fund's average return for the applicable three-year period remains below that earned by the average equivalent pooled investment vehicle sharing the same investment objective, NCME's Financial Advisor will make a determination as to whether the fund continues to be a prudent and appropriate investment.

The relative risk of the selected investment vehicle will also be reviewed on a semiannual basis, as measured by the fund's standard deviation, over the most recent one-, three-, and five-year periods. The fund's relative risk is to be calculated by independent fund evaluation services such as Lipper Analytical Services, Inc. or Morningstar, Inc.

Additional Investments (if any)

NCME has established the following criteria for selecting and retaining other investment vehicles it may wish to hold.

When determined to be appropriate by both NCME and its Financial Advisor, such investments may include direct investments, either publicly available or limited in scope and, therefore, not available to the general public. Such vehicles may or may not provide daily valuations.

The selection and use of such vehicles shall be restricted by the following criteria:

1. All such vehicles, in the aggregate, shall be no more than 5% of NCME's portfolio.
2. The proposed manager(s) of such vehicles, if any, shall have a proven and successful track record of at least five years in endeavors sharing a similar investment process.
3. Use of such vehicles shall be determined appropriate based on the needs of the overall portfolio, such that each such vehicle will be expected to help increase the overall portfolio return while not significantly increasing overall risk, or each such vehicle will be expected to help decrease the overall portfolio risk while not significantly decreasing overall returns.

Investment Monitoring and Control Procedures

1. The NCME Finance Committee will provide the Board of Directors with a report each year that lists all assets held by the NCME investment portfolio, values for each asset, and all transactions affecting assets within the portfolio, including additions and withdrawals.
2. The NCME Finance Committee will receive no less frequently than on a semiannual basis and within 30 days of the end of each such period the following reports from NCME's Financial Advisor:
 - a. Portfolio performance results over the last six months, year, 3 years and 5 years.
 - b. Performance results of each individual manager for the same periods.
 - c. Performance results of comparative benchmarks for the same periods.
 - d. Performance shall be reported on a basis that is in compliance with AIMR standards.
 - e. Semiannual status regarding asset allocation—current versus policy.
 - f. Any recommendations for changes of the above.

Meetings and Communication

As a matter of course, the NCME Budget and Finance Committee should keep the Board of Directors apprised of any material changes in the Budget and Finance Committee's outlook, recommended investment policy, and tactics. In addition, an NCME Budget and Finance Committee representative will meet with the Board of Directors no less than annually to review and explain the Portfolio's investment results and any related issues.

Duties and Responsibilities of the Board of Directors

The NCME Board of Directors is responsible for:

1. The oversight of the Portfolio.
2. Defining the investment objectives and policies of the Portfolio.
3. Directing the Finance Committee to draft changes in the investment policy and to oversee and to approve or disapprove the Finance Committee's recommendations with regard to policy, guidelines, objectives, and specific investments on a timely basis.

4. Providing the Finance Committee with all relevant information on NCME's financial conditions and risk tolerances and notifying the Finance Committee promptly of any changes to this information.

The NCME Budget and Finance Committee is expected to manage the Portfolio in a manner consistent with this Investment Policy Statement and in accordance with State and Federal law and the Uniform Prudent Investor Act. The Budget and Finance Committee is a committee of the Board of Directors and will act as the investment advisor and fiduciary to the Board until the Board decides otherwise. The Budget and Finance Committee may delegate its investment portfolio responsibilities to NCME's Financial Advisor.

The Budget and Finance Committee shall be responsible for:

1. Designing, recommending, and implementing an appropriate asset allocation plan consistent with the investment objectives, time horizon, risk profile, guidelines, and constraints outlined in this statement.
2. Recommending an appropriate custodian (Financial Advisor) to safeguard NCME's assets.
3. Advising the Board about the selection of and the allocation of asset categories.
4. Identifying specific assets and investment managers within each asset category.
5. Ensuring that the Financial Advisor provides NCME with a current prospectus, where applicable, for each investment proposed for the portfolio.
6. Monitoring the performance of all selected assets.
7. Recommending changes to any of the above.
8. Exercising all rights and voting rights, as are acquired through the purchase of securities, where practical. The Budget and Finance Committee will vote proxies according to the guidelines and restrictions outlined herein where applicable and otherwise according to the Committee's best judgment.
9. Periodically reviewing the suitability of the investments for the Board, being available to meet with the Board at least once each year, and being available at such other times, within reason, at the Board's request.
10. Preparing and presenting appropriate reports.
11. Meeting at least annually with NCME's Financial Advisor and reviewing semiannual reports provided by the Advisor.

The NCME Budget and Finance Committee or its individual members will not take title to any assets, nor will the Budget and Finance Committee or Financial Advisor exercise discretionary control over any of NCME's assets. The Budget and Finance Committee will be responsible only to make recommendations to the Board and to implement investment decisions as directed by the Board.

The Financial Advisor(s)

NCME will execute an agreement with each Financial Advisor, specifying duties and responsibilities of each Financial Advisor. The Financial Advisor(s) will meet with the NCME Budget and Finance Committee at least once per year and will provide semiannual reports, as described elsewhere in this document.

Criteria to be used in selecting a Financial Advisor are outlined in a separate document prepared by the Budget and Finance Committee and endorsed by the NCME Board of Directors.

8. Annual Meeting

The NCME Annual Meeting Program is developed under the guidance of the Annual Meeting Program Committee (see Committee section for details of composition and appointment).

The following policies currently govern the Annual Meeting:

1. NCME should continue to hold its Annual Meeting in connection with that of the American Educational Research Association (AERA). The NCME meeting is 3 days in length.
2. The program should be attentive to the needs and concerns of members.
3. NCME should continue to support and sponsor training sessions at the Annual Meeting. These workshops are handled through the Training and Professional Development Committee. The Committee receives proposals through the NCME conference submission system but may also choose to be pro-active in soliciting proposals for training sessions. Each half day session receives a \$250 stipend and each full day session a \$500 stipend. If there are two or more instructors for a given session, the reimbursement may be divided. Sessions are to be self-supporting. Thus, the Committee is encouraged to offer such sessions with an advance registration procedure that could be used to curtail an effort that is unlikely to be self-financed.
4. A member of the Board (usually the President) should be designated as liaison to the Program Committee Chair.
5. A Program Committee, if necessary, should be appointed to work with the Program Chairs.
6. It has also been suggested that Program Chairs meet with AERA Divisional Chairs early to try to “set aside” co-sponsored sessions.
7. A meeting of the Past Presidents of NCME will be convened at the Annual Meeting to review the activities of NCME and make recommendations.
8. The *Annual Meeting Program* should be mailed to members in advance of the Annual Meeting, a practice started in 1985. As of 2004, the *Annual Meeting Program* will be mailed to those who are registered for the meeting and will be made available on the NCME website. A PDF of the program should be posted on the NCME web site at least 14 days prior to the conference or as soon as prepared.
9. Beginning in 2011, NCME and Division D agreed to the following: (1) NCME’s Past President’s lunch would be held on the last day of the NCME conference to avoid conflicts with Division D’s luncheon; and (2) AERA and Division D will ensure that a list of up to 80 key NCME members will not be scheduled for any AERA program sessions during the NCME Annual breakfast. In order to ensure such conflicts do not exist, the program chairs must submit a list of 80 key members, their affiliation and email address to the Vice President of AERA Division D and AERA central office no later than October 1st. This list should include: Past presidents who regularly attend NCME, all

- current NCME officers and committee chairs, NCME members on the election ballot for the next year, and award recipients and presenters (if known at this time).
10. Tickets for the NCME Breakfast Meeting and Presidential Address at the Annual Meeting will be sold at a price established by the Board of Directors. Award recipients and family members may be awarded free tickets to the breakfast. In October, 2010, the Board approved release of up to 36 tickets for graduate student members of NCME who either served on an NCME committee or reviewed proposals for the Graduate Student Poster Session. The Board also rejected a motion to provide complimentary breakfast tickets to officers, chairs or other governance members.
 11. The Board voted to update this Handbook to reflect the fact that NATD, the Graduate Students Issues Committee, and the Diversity Issues and Testing Committee (in 2002, the Minority Issues and Testing Committee's name was changed to the Diversity Issues and Testing Committee) are allocated program time during the Annual Meeting. The Board agreed with the observation and specified that each of the entities would be allocated one session. Any of the groups, however, could submit additional sessions to the Program Committee for consideration.
 12. Beginning with the 2008 annual meeting, an LCD projector and screen will be provided in each meeting room at no charge to presenters.
 13. In March 1997, the Board approved a request from the Program Committee to provide up to five non-member invited speakers with complimentary registration for the Annual Meeting. The President should make the selection after consultation with the program committee. Customarily, NCME does not provide any travel expenses to speakers.
 14. In June 1997, the Board approved that co-chairs of the Annual Meeting Program be presented with a certificate at the Annual Breakfast to acknowledge their contributions and arduous work.
 15. The Executive Officer collects past Program Committee reports and routinely provides new Program Chairs with copies of prior year's Program Committee reports at least 60 days prior to the Annual Meeting. Copies of all programs should be retained in the central office.

At its April 1994 meeting, the Board voted that the guidelines about the survey of membership be changed to state that the survey should be updated "as needed or every three years."

8.1 Future Sites of Annual Meeting

2013 San Francisco, CA
2014 Philadelphia, PA
2015 Chicago, IL

8.2 Annual Meeting Registration Fees

The three-day Annual Meeting is held in conjunction with AERA.

Current NCME Annual Meeting Registration Fees (as of the 2011 meeting; attendees may experience expense savings by registering early):

Member	\$165.00
Non-member	\$290.00
Student Member	\$55.00
Student Non-member	\$100.00
Guest	\$45.00

8.3 Guidelines for Program Co-Chairs

A timeline for tasks of the program co-chairs, and sample materials are included in the attachments to this handbook.

8.4 Corporate Sponsorships for the Annual Meeting

Each year NCME will contact potential sponsors to contribute to the Annual Meeting. This activity should be directed by a member of the Executive Committee (President, Past President or President-Elect) who is likely to have a close working relationship across potential sponsoring organizations. This individual is referred to as the Project Director hereafter. Corporate sponsorships were increased from \$1,500 to \$2,000 in 2011 and provide the sponsor with the following benefits and services:

1. The organization's logo will be placed in a full page color ad that is placed: (a) on the home page of NCME's website in a prominent location (e.g., sidebar); (b) in the NCME breakfast brochure; (c) on NCME Fitness Run/Walk apparel; and (d) in the NCME final program booklet (print and electronic).
2. The organization's logo will be included on signage at the Annual Meeting that will be placed in proximity to the NCME information booth and NCME breakfast.
3. The organization's logo will be shown at the NCME Breakfast prior to the start of the official business meeting.
4. The president will recognize and thank the sponsoring associations for their contributions during the Business meeting.
5. The organizations will receive two free tickets to the NCME breakfast and the organizational contact will be invited to the Presidential Reception.

The Central Office will be responsible for providing an invoice to each confirmed sponsor and tracking the responses to this request. Any organizational response received by the Project Director must be immediately shared with the Central Office that is responsible for the following: (a) tracking responses, (b) contacting each organization to confirm receipt of contribution and request a copy of their logo for publication, and (c) providing the organizational contact with two tickets to the breakfast.

Timeline

June 1 - President designates a member of the Executive Committee to serve as the Project

Director for the corporate sponsorship efforts for the next Annual Meeting. The Project Director is responsible for updating the conference sponsorship spreadsheet annually and updating the list with information on sponsorship (maintaining information for the previous 5 years) and changes in the organizational contact. Appendix H is the conference sponsorship spreadsheet as of 1/2012.

July 1 - The project manager requests the following materials from the Central Office and consults with the member of the Executive Committee who directed this effort at the previous Annual Meeting: (a) The conference sponsorship spreadsheet from the previous year (Appendix H), which includes the list of sponsors contacted in the past, the organizational contacts, contact information, and the organizational response; (b) Copies of all correspondence used to solicit sponsorships; (c) Samples of conference materials used to recognize sponsors; and (d) Any other relevant information.

Early August – The Project Director revises the sponsor list and verifies the contacts with other members of the Board and NCME as appropriate. A final revised list is required by mid-August.

Mid-August – The Project Director revises the correspondence that will be sent to potential sponsors and sends it to the Administrative Office and President for review (A sample sponsorship letter is shown in Appendix G) by September 1st. The revisions will be incorporated and mail merged letters will be prepared for each organization. The Project Director will send an email which includes the customized sponsorship letter to each organization by mid-September. In some instances, the Project Director may ask another member of the Board to make initial contact with an organization because they have a more direct relationship with the organization. In these instances, the Project Director will provide the draft email and letter to the Board member. The Project Director should be cc'd in all correspondence, and is responsible for ensuring the request has been made by the mid-September deadline.

Mid-September – Once the initial request has been sent to organizations, responses may come back to the Project Director, Central Office, or another Board member. No matter who receives the response, all inquiries or requests must be shared between the Project Director and Central Office designee within four business days. When an organization agrees to be a sponsor, the Central Office will immediately follow-up and provide an invoice. In addition, the Central Office will contact the sponsor via email and provide additional logistical information and request their logo.

Late-October – Organizations who have indicated they will sponsor the conference in the upcoming year should now have received an invoice and further instructions from the Central Office, however, it is the Project Director's responsibility to work closely with Central Office to receive frequent updates concerning payment and response. The Project Director will send out a follow up request directed to either the same contact or an additional contact in the organization if no response has been received by this time. The Project Director may also solicit assistance from members of the Board to assist with the follow up inquiry in certain organizations. Central Office will inform the Project Director of the status of invoices (paid, outstanding, not sent) on the first business day after Oct 15, Nov 15, Dec 15, Jan 15, and Feb 15.

Early December – The Project Director will inform the executive committee of the final response from corporate sponsors. At that time, additional members of the executive committee or Board may be asked to make a personal inquiry to organizations that have still not responded to the two

inquiries or the Project Manager will make one final request to the organization.

January 15th – The Central Office will ensure that all logos have been received and are camera ready quality for production of graphic designs. Signage will be designed and reviewed by the Project Director before production is final (Appendix I). Central Office will complete a checklist for each sponsor to ensure their logos are included in all materials (see Appendix J) and provide copies to the Project Director for validation the first business day following Jan. 15, Feb 15, Mar 1, Mar 10, Mar 20, Mar 30, Apr 10 and Apr 20 (or until all work has been completed)

Late February – The Central Office will ensure that all logos from all paid sponsors are in the art work; that sponsors have been sent two breakfast tickets and invitations to the Presidential reception. The Project Director will validate this work has been completed with the Central Office.

Annual Meeting – See above.

Thirty days after the Annual Meeting – The Executive Director will draft a thank you letter that will be sent to all sponsors and signed by the now Past President.

8.5 Member Recognition Activities

Award recipients and NCME governance are recognized at the annual meeting breakfast in the following ways.

Award Recipients (6)

- Monetary award (varies with particular award)
- Framed certificates
- Breakfast tickets for recipients and two guests
- Recognition in newsletter and on website
- Invitation to present at following year's conference (for selected awards)

Committee members (including committee chairs, co-chairs, and outgoing committee members)

- Ribbons
- Asked to stand at breakfast
- Listed on NCME website
- Invited to attend NCME presidential reception (committee chairs only)

Outgoing committee members (including chairs and co-chairs)

- Letter of thank you from the President

Board Members (9), including outgoing Board members

- Stand at breakfast
- Ribbons
- Name and photo on website
- Name in conference program
- Invited to attend NCME presidential reception

Outgoing board members (2)

- Framed certificate

Editors (5)

- Name in conference program
- Ribbons
- Monetary support, if eligible (see handbook for policy)
- Acknowledgement in journal
- Acknowledgement on NCME website
- Framed certificate (when leaving responsibilities)

Longtime members (20+years)

- Possible articles or interviews for newsletter
- Ribbons

New members

- One drink ticket at reception
- Ribbons

Graduate students

- One drink ticket at reception
- 36 free breakfast tickets to be distributed by the Graduate Student Issues Committee
- Reserved tables at breakfast

Reviewers of Annual Meeting proposals

- Name in conference program
- Thank you note from President

Annual Meeting Program Chairs

- Name in conference program
- Ribbons
- Receive framed certificate at breakfast

Annual Meeting Training and Professional Development Committee Chair

- Name in conference program
- Ribbons
- Receive framed certificate at breakfast

Annual Meeting Fun Run Chairs

- Name in conference program
- Ribbons
- Asked to stand at breakfast

Outgoing president

- Framed certificate given at breakfast
- Gift given at breakfast
- Host invitation only reception

Past presidents

- Asked to stand at breakfast
- Past Presidents luncheon

9. Publications and Publications Process

9.1 Introduction

NCME's publications serve the following functions:

1. To provide an archive of original research on measurement, procedures for reporting and interpreting measurement results, scholarly expositions on measurement practice or the philosophy of measurement, and reports of novel and generalizable uses of measurement in education or related disciplines.
2. To promote a better understanding of and reasoned debate on timely measurement issues of theoretical or practical importance to educators and the public.
3. To facilitate up-to-date communication on matters of general intellectual, policy, and professional interest.
4. To provide a means for improving communication between the measurement specialist and the practitioner.

This section of the current Handbook contains information pertinent to NCME Publications. It was drawn from a previous NCME Handbook and the AERA Publications Handbook. Additional information (Bill Russell's Handy Hints for New Editors) can be found in Appendix K.

9.2 Description of NCME Publications

9.2.1 Journal of Educational Measurement (JEM)

Statement of Editorial Policy. *JEM* (quarterly) publishes original measurement research, reports on new measurement instruments, reviews of measurement publications, and reports on innovative measurement applications in an educational context.

JEM seeks manuscripts containing generalizable contributions to educational measurement. In keeping with the purposes of NCME, preferred topics are those likely to be of interest to persons concerned with the practice of measurement in field settings as well as measurement theorists. In addition to presenting new contributions to measurement theory, *JEM* is a vehicle for the improvement of measurement application in a variety of educational settings. When considering prospective audiences for manuscripts submitted to *JEM*, authors should keep these objectives in mind.

The types of manuscripts sought for *JEM* include reports of research on measurement processes, techniques, tools, and procedures; generalizable procedures for reporting and interpreting measurement results; scholarly expositions on the philosophy and practice of measurement; reports on novel and generalizable uses of educational measurement in education or related disciplines; reports on the development and psychometric properties of measurement instruments that are new and unavailable commercially; and reviews of publications related to educational measurement.

Submitted manuscripts within the broad domain of educational measurement will be reviewed for the accuracy of their designs, analyses, and interpretations; their appropriateness for an audience of educational measurement practitioners and theorists; the significance and generalizability of their contributions; and the originality of their content. Manuscripts are typically reviewed within a two to

three month period.

Certain types of manuscripts are unlikely to be published in *JEM*. These include:

1. Manuscripts with a focus outside the domain of educational measurement (e.g., manuscripts that describe the development or routine evaluation of new curricula). (NOTE: *JEM* will consider manuscripts where the context is not education, provided the matters considered have obvious relevance to issues in educational measurement.)
2. Manuscripts that deal principally with the new statistical methods, except those clearly pertaining to educational measurement theory and practice;
3. Manuscripts more suitable for a journal addressed to an exclusive audience of measurement theorists;
4. Manuscripts that report routine investigation of the psychometric adequacy of specific measurement instruments;
5. Manuscripts concerned with psychological issues unrelated to educational measurement;
6. Manuscripts that describe computer programs.

Manuscript Submission and Review Procedures. The text of manuscripts submitted for publication should conform to the style of the *Publication Manual of the American Psychological Association* (6th ed., 2010)

Each manuscript must be accompanied by an abstract of not more than 120 words and a suggested running head. Manuscripts should be prepared for blind review by removing references to the authors or their institutions.

Manuscripts should be doubled-spaced with ample margins. Generally, manuscripts should not exceed 30 pages; manuscripts longer than 30 pages frequently will have to be edited for length to meet journal page limitations. Subheadings should be used at reasonable intervals to aid the reader's comprehension and break the monotony of lengthy texts. Abbreviations and acronyms not easily recognized by the average reader should be explained. Mathematical symbols and Greek letters should be indicated in the manuscript as the author wants them to appear when typeset: italicized, boldface, on-line, superscript, or subscript (or combinations thereof). All pages should be numbered consecutively. All figures and tables submitted with the final, accepted manuscript should be camera ready.

Manuscripts are accepted for consideration with the understanding that they are original material and are not currently being considered for publication elsewhere. The latest issue of *JEM* and its website indicate the process for submitting manuscripts.

Review Procedures. Each manuscript submitted to *JEM* will be screened for consistency with the editorial policies of the journal. If found to be appropriate for *JEM*, manuscripts will be sent, with author identification removed, to at least three qualified reviewers. Upon receiving the recommendations of reviewers, the Editor will report a decision to the author, including reasons for the decision and the comments of reviewers. The reviewer's recommendations are advisory to the

Editor who has responsibility for making the decision to publish the article. In order to be timely, an Editor may make a decision after only two of the three reviews have been returned. Reviewers remain anonymous to the author. Each reviewer receives a copy of the Editor's letter to the author and the other reviewers' comments. The review process typically takes two to three months, but exceptional cases may require more or less time.

Final Manuscript. The tables and figures to be published are reproduced from electronic copy provided by the author. Final versions of accepted manuscripts must include originals of all figures and tables in appropriate electronic format. All figures should be submitted one to a page. Tables must be presented one to a page and generally conform to APA style. Additional specific instructions and exceptions to APA style are provided on the journal's website.

In accordance with policy established at the December 2000 Board meeting, the NCME Website can be used for the posting of supplementary materials associated with articles in *JEM* if the author of the journal article chooses to do so. These materials might include software, reference data sets, appendices, graphs and tables. The material is to be posted only upon publication of the journal article and will have no bearing on publication decisions.

(NOTE: At the discretion of the Editor one article that is substantially longer than the typical *JEM* article can be published each year. Manuscripts that will be considered as special reports include reports on the development and evaluation of new measurement processes, techniques, tools, and procedures that contribute to the solution of significant problems in educational measurement; survey papers that present a novel integration or synthesis of topics in educational measurement; and reviews of a substantial body of empirical and/or theoretical research in educational measurement. Manuscripts submitted for publication as a special report should not exceed 90 double-spaced pages including references, tables, and figures. Pages should be formatted to permit 275 to 300 words per page.)

Review Section. The Editor of *JEM* appoints a Review Editor who solicits and manages reviews of books and other publications of interest to the readership of *JEM*.

Reviews are included in *JEM* to provide up-to-date information about the content and quality of new publications in the field of educational measurement. Reviews of all publications and materials are expected to be both descriptive and evaluative in character. They are intended primarily, although not exclusively, for readers who make practical use of measurement in various kinds of educational settings.

The policy of *JEM* is to publish only solicited reviews. Two reviews of the same publication will occasionally be included. Insofar as feasible, authors of publications will be invited to respond to reviews that are critical of their works. The Review Editor welcomes suggestions regarding particular publications or types of publications for which reviews would be most helpful.

Comments. Comments on technical or substantive issues addressed in articles previously published in *JEM* are encouraged. Comments will be reviewed, and the author of the original article will be invited to respond. In keeping with NCME policy, the final decision on whether to publish the comment and/or the response will rest with the Editor.

Special Issues. It has been traditional practice for each *JEM* Editor to publish one special issue of invited papers during that Editor's term; a Guest Editor may be selected for the special issue. Such

an issue is devoted to a topic of major current importance in educational measurement. The papers for a special issue are subject to the same review process as unsolicited papers.

Indices. In the fourth issue of each volume appear subject and author indices covering that volume. In 1990 the Board decided, in order to conserve journal space for articles, to cease publication of indices that were cumulative over volumes.

9.2.2 Educational Measurement: Issues and Practice (EM:IP)

Statement of Editorial Policy. *EM:IP* (quarterly) publishes articles that illuminate issues in educational measurement and inform the practice of educational measurement. *EM:IP* is aimed at practitioners and users of assessments and includes information about proven practices in assessment, news of interest to the educational measurement community, and organizational news of NCME. Not as technical as *JEM*, *EM:IP* addresses a broad public that includes NCME members, school personnel, other professional educators, credentialing agencies, legislators, and interested citizens. Its primary purpose is to promote a better understanding of and reasoned debate on timely measurement issues of practical importance to educators and the public. *EM:IP* is a vehicle for improved communication among NCME members, and between NCME members and others concerned with educational measurement issues and practices.

EM:IP seeks manuscripts that deal with measurement issues of concern to practitioners and academics, applications of measurement techniques in educational settings, and exemplary practices. Examples of manuscripts appropriate for *EM:IP* include those dealing with specific measurement techniques for various educational objectives or controversial measurement issues; surveys of practices and changes in practices; and public critiques of testing and test use. Some articles are solicited by the Editor, often from speeches made at professional meetings. Others are selected from unsolicited manuscripts sent to the Editor.

Manuscript Submission and Review Procedures. Manuscripts should be consistent with the style described in the *Publication Manual of the American Psychological Association* (6th ed., 2010). Manuscripts are typically reviewed in two to three months.

Authors should be parsimonious in the use of tables, graphs, and figures. When used, one original copy suitable for high-quality reproduction should accompany the manuscript. Avoid footnotes when possible. Articles on examples of good practices in educational measurement and articles presenting contrasting views concerning the educational role of testing are welcome. All manuscripts [solicited or unsolicited] that are considered for publication in the Articles section are to be sent out to at least three reviewers. Except for the Presidential Address, these should be blind reviews, which advise the Editor on appropriateness and quality of manuscript or publication in *EM:IP*. Presidential addresses may be sent out for comments and suggestions for improvement at the Editor's discretion. The reviewer's recommendations are advisory to the Editor who has responsibility for making the decision to publish the article. In order to be timely, an Editor may make a decision after only two of the three reviews have been returned. The Editor conveys the decision, along with specific requests for necessary revisions, to the author. Each author receives verbatim the comments of the reviewers, who remain anonymous to the author. Each reviewer receives a copy of the Editor's letter to the author and the other reviewers' comments.

In accordance with policy established at the December 2000 Board meeting, the NCME Website can be used for the posting of supplementary materials associated with articles in *EM:IP* if the author of

the journal article chooses to do so. These materials might include software, reference data sets, appendices, graphs and tables. The material is to be posted only upon publication of the journal article and will have no bearing whatever on publication decisions.

Review Section. *EM:IP* occasionally reviews books, and other publications of particular interest to the practitioner's need to illuminate educational measurement issues or to inform educational measurement practice.

Other Material. Letters to the Editor and other departments may be carried from time to time, as space permits and the Editor determines. Suggestions from readers should be directed to the Editor.

Special Issues. From time to time an issue of *EM:IP* may be devoted to a specific topic. The Editor takes primary responsibility for making such decisions and may choose a Guest Editor for such issues.

Indices. In the fourth issue of each volume appear author, title, and review indices covering that volume. Indices that are cumulative over volumes are not published.

9.2.3 The NCME Newsletter

Editorial Policy. The *Newsletter* (quarterly) publishes announcements and brief descriptions of current activities, both internal and external to NCME that would be of interest to the membership. The *Newsletter* is intended to provide the broad diversity of NCME members with timely information about important current events in educational measurement practice and research. The *Newsletter* is also intended to inform the NCME membership about the activities of its Board and committees. Content is managed by the *Newsletter* Editor. The Editor appoints an Editorial Board and may seek advice from the Board regarding what content to publish.

Submission and Review Procedures. The *Newsletter* seeks information and short reports of events or activities relevant to educational measurement and NCME. Persons with such materials are encouraged to contact the Editor or a *Newsletter* Editorial Board member.

Materials are evaluated for their timeliness, accuracy, interest level, and importance to the NCME membership. This evaluation is made by the Editor, using information from Editorial Board members or others, obtained at the Editor's discretion.

The *Newsletter* reports educational measurement news from the federal government, states, school districts, universities and colleges, educational research laboratories, technical centers, and publishers. Significant activities of the Council's Board and its committees are reported. Announcements of articles, reports, and upcoming meetings of potential interest to the NCME membership also appear. The *Newsletter* should not be used to post job announcements or for commercial advertising purposes.

Review Process. A formal peer review process does not occur with the *Newsletter*. The Editor's judgment, aided by whatever opinions the Editor chooses to obtain, determines the publication of articles or information.

Acknowledging the Contributions of Reviewers. There is no list of reviewers to be published. The Editor is encouraged to freely cite the sources of information, both to acknowledge and encourage

contributions, and to facilitate further direct communication among members.

Support for Editor. Support is the same as that for the other Editors, with the following exceptions: The level of secretarial support for the *Newsletter* Editor is substantially less than the secretarial support required by *JEM* and *EM:IP*.

Online Access. Beginning in 2004, the NCME *Newsletter* moved to an electronic format. The *Newsletter* Editor provides a PDF file to the Website Editor for posting to the NCME website as well as a PDF file to the Central Office for archive purposes. Beginning in 2010, the central office assumed responsibility for distributing the newsletter to all NCME members via email with a link to the specific issue once it is loaded onto the NCME webpage. In addition, the Central Office maintains a separate subscriber list and sends all issues to individuals on the list. This list may include individuals who are not NCME members but have interest in NCME (e.g., policymakers, state assessment directors, etc.). The central office reviews the list with each incoming NCME Newsletter editor during their first year. All electronic issues should be maintained on the web for at least ten years. Issues should be archived and retrievable after ten years from the NCME central office.

Authors. The role of authors is substantially different in the *Newsletter* than in *JEM* and *EM:IP*. The vast majority of material to be published in the *Newsletter* is written by the Editor, Editorial Board members, or "features" authors. Occasionally a short article is written by an outside author. Reviewing, editing, and publishing of such articles are conducted according to the Editor's judgment. In most cases, authors do not review camera-copy of their articles, nor do they routinely receive complimentary copies of the *Newsletter* in which their article appears.

Right of Reply. Because the content of the *Newsletter* is primarily informational, the publication of substantive comments on previously published articles is unlikely to be suitable. The publication of such comments is based on the Editor's evaluation, with or without supporting reviews by others, of the importance and information value of the comment. If such a comment is published, the Right of Reply policy applies, with the expectation that comments and replies are much shorter in the *Newsletter* than in *JEM* or *EM:IP*.

The Editor strives to publish only accurate information. If an error is brought to the Editor's attention, the Editor publishes a correction, if in the Editor's opinion the correction is important and timely.

Copyright and Permission to Reprint. To protect the works of authors and the Council, NCME copyrights all its publications, with the exception of its *Newsletter*, which is in the public domain. Readers may copy any articles in the *Newsletter* that have not been previously copyrighted. NCME requests that reprinted material include a credit line citing its source.

9.2.4 ITEMS

The goal of the Instructional Topics in Educational Measurement Series, a.k.a. *ITEMS*, is to improve the understanding of educational measurement principles by providing brief instructional units on timely topics in the field, modules developed for use by college faculty and students as well as by workshop leaders and participants.

Instructional modules are designed to be learner-oriented and consist of an abstract, tutorial content, exercises, and annotated references. The teaching aids accompanying most modules are designed to

support the use of the instructional modules in teaching and workshop settings by providing supplemental student exercises, references, test items, and slides for presentation.

ITEMS modules are available on the NCME website. The website has been updated so that each previously published *ITEMS* module is available as a PDF file. Members can download these files at no cost. Modules should be maintained on the website for at least ten years and available from the central office archives indefinitely.

9.2.5 NCME Website

The NCME Website is to assist NCME in fulfilling its mission to advance the science and practice of measurement in education. Thus, the website is to provide support to NCME members related to their involvement in the organization, as well as to provide measurement resources for members and non-members of NCME who have interests in technical and policy issues. The NCME Website Content Editor is responsible for all content posted on the website, and is assisted by several individuals within the organization as well as by members of the NCME central office (i.e., Executive Director, Meeting Planner, Membership Coordinator, and Webmaster). In particular, the Website Content Editor is to collaborate with the Website Management Committee and Webmaster on issues related to organization, functionality and design, procedures, and budgetary issues. In terms of assistance with preparing and updating content, the Content Editor is to be assisted by the Website Editorial Board. (described in section 9.5.6.) The current draft of Website Policy, found in section 9.8, more fully describes the types of content that can and cannot be incorporated into the website.

Website Management Committee. This committee is responsible for developing website policies and procedures; overseeing website updates, organization, and functionality; auditing website traffic and making necessary revisions to the design. The committee will evaluate the design of the website every three years and be prepared to implement, and evaluate a redesigned website based on the evaluation. The Website Management Committee reports to the Board through the Vice President.

Webmaster. This individual is responsible for ensuring that the web servers, hardware and software are operating accurately; designing the website; generating and revising web pages; and examining traffic through the site. The Webmaster takes direction from the Website Content Editor, Chair of the Website Management Committee, and the NCME Executive Director.

NCME Board of Directors. The Board of Directors is responsible for adopting website policies, reviewing requests for additional resources to implement changes to the website, appointing a Website Content Editor following a process similar to the one used with other editors, and collaborating with the Website Content Editor in the development of new content to further the mission and vision of NCME

NCME Executive Director. The Executive Director is responsible for facilitating the flow of internal and external requests related to the website to the appropriate entities, and directing requests for website updates to the Website Content Editor and Website Management Committee

9.2.6 NCME Edited Book Series

In 2011, the NCME Board approved the creation of an edited book series which is tentatively titled “The NCME Applications of Educational Measurement and Assessment Book Series.” This series is intended to increase understanding and inform research-based applied educational measurement and assessment. The intended audiences include NCME members, graduate students in measurement and assessment, and professionals in related fields engaged in measurement and assessment (e.g., psychology, educational leadership, educational policy, curriculum and instruction, and certification and licensure).

Objectives of the Series: The overall objectives are to inform practice in educational measurement and assessment. The primary audience will be both NCME members (including graduate students) and non-members in related fields (e.g., engaged in practice or applications of educational measurement and assessment, and non-members in related fields (e.g., psychology, educational leadership or administration, education policy, curriculum and instruction, and certification and licensure) engaged in educational measurement or assessment. NCME hopes these volumes will increase knowledge and understanding about measurement and assessment, as well as stimulate continuing research-based practice in measurement and assessment. This book series is distinct from the two separate volumes that NCME has established and maintained (Educational Measurement, Handbook of Test Development). Each of those two products will continue to be part of NCME’s publications efforts, but not incorporated into this proposed series because they are designed to serve other purposes and audiences.

NCME will receive six complimentary copies of the paperback version of each Series volume upon publication. Each volume editor will be entitled to three complimentary copies of the paperback version and to a 25% discount off the list price of all book publications of the Publisher. Each chapter contributor (up to a limit of three contributors per chapter) will be entitled to one complimentary copy of the paperback version of the Work and will be permitted to purchase all other publications of the Publisher, for their personal use, at a discount of 20% off the list price.

The Series will consist of edited volumes and that this Agreement will be supplemented by separately signed Agreements between the volume editors and the Publisher, in which similar terms and conditions are provided. NCME will develop ideas for volumes; search for appropriate editors; review and evaluate proposals; and assist editors in developing their manuscripts. Series volumes are expected to range between 120,000-235,000 words, which converts to 256-500 printed pages using a 7 x 10 trim size. The following target projects are representative of the Series mission:

Measurement Based Accountability Models

Theoretically grounded test designs

Automated Scoring

Fairness in Testing

Management Process

Editorial Board. NCME has established a 6 person editorial board. The editorial board will identify potential topics for books from collaboration with the publisher, invitation, and proposals from members. The members of the editorial board must be “highly committed to the

success of the project and have reputations as conscientious authors and experienced editors, who can, without excuses, meet deadlines and work well with a wide range of potential volume editors and authors.”

The Editorial Board will be funded by NCME to meet at once annually. Such meetings should occur in relation to the NCME Annual Meeting and reimbursement would be limited to lodging and meals required for one additional day. However, a stand-alone meeting may be required every several years. NCME will also support other miscellaneous expenses such as conference calls and WebEx as needed. The Editorial Board will develop an annual budget. It is also proposed that the Chair of the Editorial Board be invited to attend at least one Board Meeting annually with other chairs (summer or fall meeting) to report on the progress of this series.

Duties of the Editorial Board. The topics should be evaluated by the publisher in terms of market demand and sales potential, and by the editorial board in terms of substance, contribution and need in the field. The editorial board should solicit proposals for edited books as well as develop its own proposals. The editorial board will have ultimate authority to decide on topics in consultation with the publisher. The editorial board will also direct all other aspects of each volume in close consultation and coordination with the publisher. The choice of volume editor(s) will be made by the editorial board, with consultation from the publisher. The chapter editors will be selected by the editor(s). A member of the editorial board will be assigned to manage each volume and will serve as NCME’s primary liaison to the editor and publisher regarding all aspects of production. A precise timeline must be approved by the publisher and editorial board prior to any formal agreement with editors. Once a timeline has been accepted, the NCME liaison is responsible for working closely with editors to ensure work progresses on schedule. It is important to have a contingency plan for each volume in the event some chapters are simply not produced. Identifying alternate authors or planning to proceed without a chapter should be considered when any deadlines are missed early in the process. The editorial board will establish policies which govern delays or other disruptions.

9.2.7 Occasional Publications

In addition to its periodicals, NCME sponsors other publications if the need arises to disseminate information that is too lengthy or not within the editorial scope of the NCME periodicals. The need for special publications is identified through recommendations by the Board, the Publications Committee, NCME members, or others. Surveys to identify areas of interest may be used to assist in determining a need for publication on a popular topic.

The Publications Committee reviews all proposals for publications and makes recommendations to the Board. Proposals should include an outline of the publication content and estimated costs. If the Board accepts a proposal, an Editor of the special publication is appointed by the President with the approval of the Board of Directors. The Editor directs the production of the special publication, with the advice of the Publications Committee, the Board, or others, as appropriate. All budgets must be approved by the Board.

9.3 Page Allotments

Each journal is budgeted a page allotment for the year, and all NCME periodicals have limitations on the number of pages they may contain. They are as follows.

<i>JEM</i>	124 pages per issue
<i>EM:IP</i>	52 pages per issue, including <i>ITEMS</i>
<i>Newsletter</i>	No real limit for electronic version.

Editorial pages include front matter and indices (if any), but do not include paid ads (each journal has 4 pages reserved for paid ads). Editors who anticipate exceeding page allotments should request from the Board or Executive Committee an allotment revision in the budget, having first consulted with the Executive Officer in order to determine the impact additional pages will have on the journal's printing/ mailing budget.

Additional pages are costly. As of 2010, each additional page for *JEM* costs \$30.25, and each additional page for *EM:IP* costs \$48.30.

9.4 Contacts Relevant to NCME Publications

Wiley/Blackwell Publishing Co. Services to Journal Editors. The content of a publication is determined by the Editor. The manufacture and dissemination of the publication are the responsibility of Blackwell. Editors work with the Blackwell staff in establishing any procedures, designs, or special issues with full consideration of the Board's purpose, budget, and staff. The Blackwell staff is responsible for technical (not substantive) editing and for correspondence with authors after manuscripts have been accepted for publication.

9.5 Editors

9.5.1 Editorial Appointment Process

Periodical and Website Editors

The appointment process for the editors of the *Journal of Educational Measurement*, *Educational Measurement: Issues and Practices*, *ITEMS*, the *Newsletter*, and the *Website* has five steps:

1. The Publications Committee conducts an open search for Editorial candidates. Depending on the publication, the search should begin 12 to 21 months prior to the end of the current Editor's term, with the appointment occurring 6 to 15 months prior to the end date (*JEM* and *EM:IP* require longer transitions). This search may include, but is not limited to, advertisements in NCME Publications and surveys at the NCME Breakfast, as well as contacting previous Editor(s), Editorial Board Members, NCME Board Members, and NCME current and past presidents. The Publications Committee contacts the candidates, describing the responsibilities and financial support accompanying the Editorship, and determines whether each person would like to be considered for the position. Curriculum vitas are collected for all interested candidates.
2. The Publications Committee creates a short list of three to six acceptable candidates and presents the list to the President. For the Website Content Editor's position, the Publications Committee consults with the Website Management Committee and the current Editor when preparing this list. Copies of the vitas for the candidates should accompany the list.
3. The President identifies and rank orders the top three candidates and presents that list to the Board.

4. The Board votes on each of the candidates identified on the President's list.
5. Starting at the top of the approved list, the President acts on behalf of the Board to contact the candidate and officially offer the post. If that person declines, the President offers the position to the next ranked person. In the event that no candidate accepts the position, the search is reopened.

Editors of Occasional Publications

The Editor of an occasional publication is appointed by the President with the approval of the Board of Directors. The Editor directs the production of the special publication, with the advice of the Publications Committee, the Board, and others, as appropriate.

9.5.2 Timeline for Editorial Appointments

	2011	2012	2013	2014	2015	2016	2017	2018
JEM		----->	----->	----->	----->	----->	----->	----->
EM:IP	----->	----->	----->	----->	----->	----->	----->	----->
News	----->	----->	----->	----->	----->	----->	----->	----->
ITEMS	----->	----->	----->	----->	----->	----->	----->	----->
WEB	----->	----->	----->	----->	----->	----->	----->	----->

-----> Call for nominations, Nomination by Publication Committee, Appointment by NCME President, Transition
 -----> Term of service

9.5.3 Past and Current Editors of the NCME Publications

Journal of Educational Measurement

Richard E. Schutz	Volumes 1-5	1964-1968
Jason Millman	Volumes 6-8	1969-1971
Robert L. Linn	Volumes 9-11	1972-1974
Richard M. Jaeger	Volumes 12-14	1975-1977
Lorrie A. Shepard	Volumes 15-17	1978-1980
Leigh Burstein	Volumes 18-20	1981-1983
Ross E. Traub	Volumes 21-23	1984-1986
Wendy M. Yen	Volumes 24-26	1987-1989
James Algina	Volumes 27-29	1990-1992
Mark Reckase	Volumes 30-32	1993-1995
Rebecca Zwick	Volumes 33-35	1996-1998
Daniel Eignor	Volumes 36-38	1999-2001
Barbara Dodd	Volumes 39-41	2002-2004
Michael Kolen	Volumes 42-44	2005-2007
James Carlson	Volumes 45-47	2008-2010
Brian Clauser	Volumes 48-50	2011-2013
Jimmy de la Torre	Volumes 51-53	2014-2016

Educational Measurement: Issues and Practice

Frank B. Womer	Volumes 1-4	1982-1985
Walter M. Haney/Edward F. Reidy	Volumes 5-7(Number 1)	1986-1988
Walter M. Haney	Volume 7 (Numbers 2-4)	1988
Anthony J. Nitko	Volumes 8-10	1989-1991
John J. Fremer	Volumes 11-13	1992-1994
Linda Crocker	Volumes 14-16	1995-1997
Jeffrey Smith	Volumes 17-19	1998-2000
Jeri Benson	Volumes 20-22	2001-2003
Steven Ferrara	Volumes 23-25	2004-2006
Susan Brookhart	Volumes 26-28	2007-2009
Jacqueline Leighton	Volumes 29-31	2010-2012
Derek C. Briggs	Volumes 32-34	2013-2015

ITEMS

Barbara Plake	1987-1988
Fred Brown	1988-1989
Rick Stiggins	1992-1993
Michael Zieky	1998-2000
Deborah Harris	2001-2005
Mark Gierl	2006-2011
Holmes Finch	2012-

Newsletter

Joy A. Frechtling	Volumes 1-2	1992-1993
Audrey Qualls	Volumes 3-4	1994-1996
Lisa Smith	Volumes 5-7	1997-1999
Douglas Becker	Volumes 8-10	2000-2002
Susan Brookhart	Volumes 11-13	2003-2005
Scott Bishop	Volumes 14-16	2006-2008
Thanos Patelis	Volumes 17-19	2009-2011
Susan Davis Becker	Volumes 20-22	2012-2014
Heather Buzik	Volumes 23-25	2015-2017

NCME Website

Delwyn L. Harnisch	1998-2002
Bradley Hanson	2002
Delwyn L. Harnisch (interim)	2002-2003
David Miller	2003-2005
John Willse*	2010-2013
Brett P. Foley	2014-2016

9.5.4 Support for Editors

9.5.4.1 NCME Financial Policies and Procedures Pertinent to Editors

NCME Editors should be familiar with NCME's Financial Policies and Procedures, which are provided in Section 7.

9.5.4.2 Budget Preparation

During the summer, editors should submit to the NCME Publications Committee Chair an editorial budget request for the upcoming fiscal year. The Chair will then share the budget with the NCME Executive Committee, the Budget and Finance Committee, and the Central Office. Editors are then notified of the budget approved by the Board for the upcoming fiscal year.

1. Two months prior to the Annual Meeting, Editors will be requested by the Publication Committee Chair to submit a budget for their activity for the following fiscal year. Newly appointed editors will be provided a copy of the prior years' budgets. At least one month prior to the Annual Meeting, the Chair of the Publications Committee will then prepare a budget covering all expenses associated with NCME publications (including Editorial expenses) for review by the Budget and Finance Committee. Budget requests will be reviewed and then incorporated in the initial budget prepared by the Budget and Finance Committee. The Budget and Finance Committee will forward recommended edits and/or revisions of editorial and production budget requests to the Board of Directors for approval.

* In 2010, the NCME Website Content Editor position was established.

2. An operating budget will be approved by the Board at the Annual Meeting. Each Editor will be notified by the NCME President of the Board's action.
3. Changes in an approved budget (line item or a request for additional resources) must be reviewed by the Budget and Finance Committee and approved by the Board or Executive Committee prior to the change being implemented.

9.5.4.3 Reimbursement, Honoraria, and Royalties

Members of NCME assume a professional obligation to further the goals of their association through contributions of their time and talent. It is expected that NCME members will consult their institutions regarding any institutional support prior to committing to assuming significant responsibilities in serving the association. This is particularly important for editors and associate editors.

NCME Editors should attempt to negotiate the type and level of support with their institution and if it is not adequate to perform the editorial duties at that time they should withdraw from consideration. When support is not available, NCME provides funds for secretarial, editorial or clerical support, up to \$6,000 annually, subject to approval by the Board. Payments will be made directly from NCME to the individual or organization providing the service(s) (including the editor's institution) upon receipt of a detailed invoice.

Payment of indirect costs (overhead) to institutions is not permitted. Payments for released time or editorial stipends are also not permitted. These funds are limited to support for four editors (*JEM*, *EM: IP*, *Newsletter*, and *Website*).

9.5.5 Roles and Responsibilities of Editors

Periodical Editors' Role

The Editors of NCME publications fill an important role. Under their auspices the results of disciplined inquiry are disseminated and become part of the educational literature for which the Council is recognized. Editors, with assistance from reviewers, Associate Editors, and/or an Editorial Board, strive to publish scholarly material of the highest quality.

Website Content Editor's Role

A Website Content Editor serves a three-year term and reports to the Board through the Publications Committee. It is anticipated that the Content Editor will serve a single term, but in some circumstances he/she could be reappointed to a second three-year term. The Website Content Editor works with members of the NCME Board of Directors, the Website Editorial Board, and other NCME editors to evaluate suggested messages or topics to include on the website. The Website Content Editor prepares an annual plan for the development, placement, and review of new content for the website. The Website Content Editor identifies relevant content to feature on the website and commissions NCME members in the development of this content; and writes and/or edits copy for the entire website. The Website Content Editor appoints and utilizes the Website Editorial Board for evaluating the relevance, accuracy, and appropriateness of measurement-related content submitted for posting; and to review and update content.

Editors' Roles in Defining Editorial Policy

Specific editorial policy statements for a periodical are reviewed, and perhaps modified, by newly appointed Editors of the respective periodicals. These statements must be approved by the Board of Directors prior to their issuance.

Editors' Reports to the NCME Board

NCME Editors report to the Board, which is responsible for the NCME's various publications. Editors of periodicals may be requested to attend the Board meetings at the Annual Meeting as well as other meetings the Board deems necessary. Editors' participation in an advisory capacity is an important contribution to the Board's deliberations.

For its spring and fall meetings, the Board of Directors expects a written status report from each Editor. The report should be submitted to the chair of the Publications Committee about one month before the meeting is to be held so that it can be reviewed and forwarded to NCME's Central Office for inclusion in the package of materials sent to each Board member prior to the Board meeting. In their reports, Editors should describe the number of submissions, acceptance rates, and length of time involved in the review cycle. Suggestions for changes and any problems or unusual developments in the editorial operation also are appropriate to provide. Any other information or concerns that an Editor wishes to direct to the Board's attention can also be included.

Although Editors are not routinely required to attend a Board of Directors' meeting, the Editor may be asked to do so when a particular action by the Board has been requested by the Editor. The Board of Directors must approve changes in an Editor's budget or page allocations. Decisions such as these should be requested as an action item that is put on the Board of Directors' meeting agenda. If the Board of Directors is not meeting before a decision is required, then the Executive Committee should be contacted and asked to act in place of the Board.

Editors submit budgets to the Board for approval. Editors have the responsibility of adhering to approved budgets and to other limitations, such as publication schedules and the numbers of pages allowed for their publication. More details are provided in the Support for Editors section that follows below.

Editors of Occasional Publications

Editorial Boards for occasional publications usually play a more substantive role in the shaping of contents than those serving a periodical. While a breadth of understanding and experience in the field is an important criterion in the selection of the Editor of an occasional publication, both the scope and the size of the work often require an active, working Board who frequently become involved in the definition and commissioning of chapters in consulting with individual authors, or in sharing the editing burden.

9.5.6 Associate Editors and Editorial Boards

Depending upon the publication's scope and production time, an Editor may solicit the assistance of Associate Editors, an Editorial Board, and peer reviewers. Editors of all NCME periodicals have the prerogative to appoint their Associate Editors and Editorial Board; they also may develop informal

expectations of the responsibilities of their Editorial Boards.

Journal of Educational Measurement

The incoming Editor may, at his or her discretion, appoint up to three qualified Associate Editors who are members of NCME and who have expertise in the field of measurement and a record of scholarly accomplishment. Associate Editors assist with many editorial functions such as recommending peer reviewers, reviewing manuscripts, and evaluating and integrating comments from other reviewers. While Associate Editors make publication recommendations to the Editor, the final decision and any communications with authors regarding publication decisions are the responsibility of the Editor. When selecting Associate Editors, effort should be made to achieve balance and diversity in terms of areas of expertise, geographic location, institutional affiliation, and other factors.

The *JEM* Editorial Board is also appointed by the Editor and is chosen to represent the diversity of the NCME membership. Up to 30 Editorial Board members may be appointed. Board members serve a three-year term coincident with the term of the Editor. Editorial Board members contribute to *JEM* by reviewing manuscripts more frequently and on a more regular basis than occasional reviewers. At the request of the Editor, they may also help to develop editorial policy.

Educational Measurement: Issues and Practice

The incoming Editor may, at his or her discretion, appoint up to three Associate Editors who are members of NCME and who have expertise the field of measurement, particularly as it relates to the practice of measurement and its implications for policy. Associate Editors assist with many editorial functions such as recommending peer reviewers, reviewing manuscripts, and evaluating and integrating comments from other reviewers. While Associate Editors make publication recommendations to the Editor, any communications with authors regarding publication decisions are the responsibility of the Editor. When selecting Associate Editors, effort should be made to achieve balance and diversity in terms of areas of expertise and other factors. Associate Editors may be designated for special purposes (e.g., cover art; graphics column).

The *EM:IP* Editorial Board is also appointed by the Editor and is chosen to represent the diversity of the NCME membership. Up to 30 Editorial Board members may be appointed, but traditionally the number has been smaller. Members serve for a term of one year and may be reappointed at the Editor's discretion. The Editor defines the role of the Editorial Board to facilitate maintaining a high quality publication. For example, they may assist the Editor in selecting themes, seeking manuscripts, locating materials of interest to readers, and/or reviewing manuscripts. Editorial Board members are expected to review manuscripts on a regular basis, advise the Editor on publication decisions in areas of their expertise, recommend topics for special issues, and assist in seeking out high quality manuscripts for submission to the journal. They may meet with the Editor at the NCME annual meeting to review the past year and discuss the direction of the journal.

Newsletter

The *Newsletter* Editorial Board is appointed by the Editor and is chosen to reflect the diversity of the NCME membership. Terms for members of the Editorial Board parallel the term for the editor. The Editor defines the role of the Editorial Board to facilitate the publication of timely, accurate, and

important reports to the membership. The Editorial Board does not serve as formal reviewers as with *JEM* and *EM:IP*. Instead, they provide information, announcements, and newsworthy reports and reactions to material at the request of the Editor.

Each quarter, members of the Editorial Board should submit something from their area for publication in the *Newsletter*. Submissions can be announcements, news from their area, requests, updates, or humor pieces. They can range from a few sentences to a full page in length. If an Editorial Board member does not have anything for a particular issue of the *Newsletter*, he/she should notify the Editor.

All submissions are sent to the Editor of the *Newsletter*. The Editor decides what is published

Website

The incoming Editor may, at his or her discretion, appoint up to two Associate Editors who are members of NCME and have a strong interest in fulfilling NCME's mission. Associate Editors assist the Editor with planning and updating website content, identifying members to develop Website content, and writing/ editing material for the website. Associate Editors for Website Content are typically selected for their appreciation of the public nature of the Website and its purpose (e.g., support NCME members seeking professional involvement; resource to nonmembers)

The Website Editorial Board is also appointed by the Editor and is chosen to reflect the diversity of the NCME membership. Terms for members of the Editorial Board parallel the term for the editor. The Editor defines the role of the Editorial Board in order to facilitate maintaining relevant, accurate, and appropriate measurement-related content on the website. For example, they may assist the Editor in selecting themes, seeking manuscripts, locating materials of interest to readers, reviewing manuscripts, and/or advising the Editor on publication decisions. They may meet with the Editor at the NCME annual meeting to review the past year and discuss future directions of the website.

9.5.7 Publication Schedules

The Managing Editor for each journal contacts the Editor with a time frame or schedule of when manuscripts and disks for each issue must be sent to the Central Office.

9.5.8 Acknowledging the Contributions of Editors

Recognition of Editors and contributors is made during the Breakfast Meeting held during the NCME Annual Meeting.

9.5.9 Liability

The Editors of *JEM*, *EM:IP*, the *Newsletter* and Editors of occasional publications shall bear no personal liability for expenses of the corporation, and in event such liability for any reason should attach, other than for defalcation, the corporation will indemnify the above named officers.

9.5.10 Publication Copies

Editors of periodicals will receive five copies of the journal for their use and reference, in addition to copies used for special purpose, such as promotion, as arranged with the Central Office and in accordance with an approved publication budget.

9.5.11 Confidentiality

A reviewer must treat a submitted manuscript to *EM:IP* or *JEM* as a confidential document. If the reviewer shares the manuscript with a person from whom specific advice is solicited, the identities of those consulted will need to be disclosed to the editor of the respective journal.

The *EM:IP* or *JEM* editorial team shall disclose no information about a manuscript under consideration to anyone other than those from whom professional advice regarding the publication of the manuscript is sought.

9.6 Manuscript Reviewers

9.6.1 Review Process

The general design of the review process is described here. Specifics of the process applying to each periodical are presented in the sections for those periodicals.

To determine if a manuscript is appropriate for a particular publication, the Editor initially screens all submitted manuscripts. If the subject of the article falls outside of the publications editorial purview, or if the Editor decides the article would be better received by the audience of another publication, no further review is usually necessary. The volume of manuscripts submitted annually for publication in NCME periodicals and the diversity of fields they represent preclude a more extensive review process in those cases.

Manuscripts that pass the Editor's initial screening undergo peer review, following the review procedure used by the periodical. NCME periodicals have traditionally followed a blind review system for all manuscripts considered for publication as articles. Reviewers are chosen by the Editor to be broadly representative of the membership, disciplines, and field pertinent to the subject material of each publication. Their competence in judging the quality of manuscripts is also important. Critical comments from reviewers enable Editors to make the ultimate decision to reject, require revision, or publish a manuscript.

Each manuscript is reviewed following the procedures specified by that periodical's editorial policy. In some cases more than the normal number of reviews is obtained if an Editor judges that further input is needed to reach an editorial decision. On occasion an Editor may reach an editorial decision based on fewer reviews than normal; this may occur when the appropriate editorial decision appears clear to the Editor based on the existing review(s), and it has proved impossible to obtain additional review(s) in a reasonable time period.

9.6.2 Reviewers' Guidelines

Given below are possible guidelines that an NCME Editor might include with a manuscript sent to a reviewer. Some points might be mentioned in the Editor's cover letter, and others might be

mentioned in separate review form sent to reviewers. This material may or may not be helpful to an Editor; it can be used or ignored as the Editor sees fit.

Possible Text Preceding Guidelines. *Thank you for agreeing to review the enclosed manuscript. The review process is one important means of preserving the quality of NCME journals. Also it can provide useful feedback to authors who submit their work for publication.*

Guidelines. These are some possibilities:

1. At the beginning of your review a brief summary (1-4 sentences) of your understanding of the purpose of the research may be helpful. This summary will let the authors know how well they communicated the purpose of their research. It also lets them know that you attended closely to the manuscript.
2. Your review should mention the most important strengths and/or weaknesses of the research as you see it. Some manuscripts may be uniformly excellent, whereas others might have significant strengths and/or weaknesses. It is important that you convey an accurate picture of the work. To do this you might consider, among other things, the importance of the research topic addressed, the appropriateness of the methodology used, the clarity of the writing, the soundness of the conclusions drawn, the generalizability of the findings, and plausible alternative hypotheses that were not addressed.
3. When you discuss weaknesses of the research, distinguish between correctable weaknesses (e.g., a weak literature review) and fatal flaws (e.g., poor design) in the research.
4. For correctable weaknesses, suggest ways in which the authors might fix them.
5. In general, it is useful to create a constructive tone in your review so that your evaluation is helpful and educational to the author. When you express opinions about the research problem, the methods used, and/or the conclusions drawn, it can be helpful to explain in detail the basis for these opinions.
6. Try to be objective in your reactions. For example, if the research is critical of work (including your own) that you consider to be meritorious, make an effort to evaluate the criticism objectively.
7. Please complete your review within the time frame that I have specified. If for some reason you cannot do this, please let me know immediately.
8. If you feel that the topic of the research is not within your areas of expertise or that the research may pose a professional conflict for you, please return the manuscript to me immediately with a note of explanation. If you can, also please suggest other people who might be able to serve as reviewers of the research.

9.6.3 Acknowledging the Contributions of Reviewers

Editors publish from time to time (typically on a yearly basis) the names of reviewers to inform the field of who is serving in this capacity and to recognize prominently the reviewers' contributions. This acknowledgment normally appears in the last issue of each volume year or the first issue of the succeeding issue.

9.7 Authors

In processing manuscripts submitted for publication, Editors correspond both with authors and reviewers. An editor may find that several exchanges with an author are necessary before the manuscript is revised to their mutual satisfaction and that of reviewers.

9.7.1 Style Guidelines

All material submitted for publication should conform to the style of the *Publication Manual of the American Psychological Association* (6th ed., 2010). More detailed author guidelines are contained in the section describing each periodical.

9.7.2 Author Alterations

Authors are sent galley proofs from the publisher for approval. In rare cases, the manuscript may be sent to the author prior to typesetting if the technical editor's queries are so extensive that revisions are necessary. Vigilance by the Editor and the reviewers help to prevent this occurrence. Authors are urged to make only those changes that are essential. They will be charged at the current printing rate for extraneous alterations on proofs that result from author's errors or omissions in the manuscript. Failure to pay may delay publication.

9.7.3 Complimentary Copies and Reprints

Primary and secondary authors of periodical articles receive one complimentary copy of the publication in which their article appeared.

Authors of articles in occasional publications receive a complimentary copy/copies as determined by the contract between NCME and the publisher.

9.7.4 Grievance Procedure for NCME Publications

A grievance is defined as a conflict between an individual (or group) and an Editor (or Editorial Board) that cannot be resolved by the parties.

The paragraphs below define the steps to be followed when there is conflict over whether a paper should be accepted for publication in an Editor's journal or over the Editor's requirements to the author(s) for revising the manuscript. Other conflicts that may arise during the publications process should be described in writing and addressed to NCME's Publications Committee, which will work with NCME's Executive Committee to resolve the conflict.

As a first step, the author(s) and the Editor must attempt a collegial resolution of the conflict. If this attempt is successful, no further action or record is necessary.

The following six steps should be carried out if this attempt is not successful and the author(s) submits to the Editor a written request to initiate a grievance process. The six steps should be

completed within 90 days of the Editor's receipt of the written request.

1. When the written request is received by the Editor, the Editor immediately will submit this request to the Chair of NCME's Publications Committee. The Chair in turn will notify the Executive Committee and Executive Officer that a grievance process has been initiated.
2. The Chair of the Publications Committee will solicit from the author(s) and the Editor a written history of the circumstances and events leading to the grievance.
3. Having received the requested documentation from both the author(s) and the Editor, the Chair of the Publications Committee will ask each party to nominate past editors of the publication who would be able to coordinate an independent review of the manuscript.
4. Upon receipt of the nominations, the Publications Committee will name a past editor to coordinate the independent review. In the text that follows, this individual will be called the Past-Editor.
5. The Past-Editor will send out the manuscript in question for anonymous peer review, selecting at least two different but appropriate peer reviewers. The charge to the peer reviewers should take into account the substantive points of the author(s)' and Editor's documentation. A copy of the cover letter that is sent to the peer reviewers, with their names and other identifying information removed, will be sent to the current Editor and to the author(s).

When the peer reviews are returned to the Past-Editor, they will be evaluated by the Past-Editor. The Past Editor will submit a written recommendation concerning the disposition of the paper to the Chair of the Publications Committee along with the anonymous peer reviews. A copy of the written recommendation and the anonymous peer reviews also will be sent to the current Editor and the aggrieved author(s).

6. The Publications Committee will review the materials submitted to it, decide what action should be taken, and implement the action.

The operating rules that are to be followed by all parties involved in all steps of the grievance process will include the following:

1. All grievance cases will be treated confidentially. Information may be shared only with the authors and Editors involved, the Executive Committee, and the Executive Officer.
2. All parties will proceed with care and respect for all persons involved.
3. All parties will respect the rights and privileges of the Editors to exercise professional judgment within the Council's policies and guidelines.
4. All parties will attempt to resolve the issues expeditiously, while at the same time ensuring that each case receives a thorough examination of all relevant issues.

9.7.5 Copyright and Permission to Reprint

Reprinting in either original or edited form of any copyrighted publication of NCME requires written

permission from NCME Central Office and the publisher.

Periodicals

To protect the works of authors and the Council, NCME copyrights all of its publications, except the Newsletter, which is in the public domain. Authors are responsible for obtaining written permission to publish material for which they do not own copyright. No article will be published unless a copy of the NCME release form is signed by the primary author and returned to the Editor or to Blackwell.

ITEMS modules were originally published in Educational Measurement: Issues and Practice, but they have been reprinted, together with authors' teaching aids, to facilitate classroom use. Additionally, the ITEMS modules can be downloaded as PDF files from the NCME website. Finally, to maximize the availability and usefulness of the materials, multiple copies of ITEMS modules may be made for instructional purposes.

Readers may copy any articles in the Newsletter that have not been previously copyrighted. NCME requests that reprinted material include a credit line citing its source.

Occasional Publications

NCME retains the copyright to occasional publications and functions in the capacity of "author" in relation to the publisher. Chapters or articles developed for these works are "commissioned" by the Editor on behalf of the Council, and authors or contributors are expected to sign an agreement transferring rights to the Council and guaranteeing the originality of the manuscript.

Under the Copyright Act of 1976, such works are considered "works for hire" and any reprinting requires specific permission in writing from the Council. Because of the need to recover the developmental costs of the work through royalties earned on the sales of copies, automatic permission to reprint chapters from NCME occasional publications is not granted to authors. The council generally grants authors the right to reprint after the edition has been available for two or three years, although the specific interim depends on the individual title.

9.7.5.1 Copyright Transfer Agreement Forms

Authors of articles published in NCME periodicals are asked to "transfer copyright" to the Council and are expected to sign an agreement guaranteeing the originality of the manuscript. Authors of articles appearing in periodicals automatically receive permission to use their work elsewhere without charge. They must, however, request permission in writing from the Central Office.

Copyright transfer agreement forms are sent to the primary author from the Editor's Office or from Blackwell. The form delineates NCME's policy concerning the privileges assured to the author.

9.8 Obituaries

The following policies apply to the publication of obituaries in NCME publications.

If the Editor of the NCME *Newsletter* learns of the death of an active NCME member or a past member, and the fact is verified, the Editor may include an announcement of the member's passing. The Editor will use her/his judgment in deciding upon inclusion and wording of such notices.

Death notices and memorials normally will not appear in *JEM* or *EM:IP* unless the deceased person had a particularly close association with and exceptional contribution to the journal or organization. The suitability of publishing such a notice or memorial will be determined by the Editor.

If the Website Content Editor learns of the death of an active NCME member or a past member, and the fact is verified, the Editor may include an announcement to that effect. The Editor will use her/his judgment in deciding upon inclusion and wording of such notices. A picture, if offered, may be included as part of the memorial. The Editor will use her/his judgment in deciding upon placement of such notices (e.g., on the launch page, in a separate section devoted to obituaries, etc.).

9.9 NCME Reprint Policy, Fair Use

Reprint Policy (Note that the policy shown in this appendix for journal publications has been superseded by the contract with Blackwell Publishing. NCME's official policy regarding copyright and reprint is similar to that of Blackwell's and should a publisher other than Blackwell be selected to publish NCME journals, this policy will be in effect.)

One of the primary goals of NCME is to foster the creation and dissemination of scholarly works related to the science of measurement in the field of education. In order to protect the works of the Council and its authors, NCME copyrights *Journal of Educational Measurement* and *Educational Measurement: Issues and Practice*. Permission is required to quote, reproduce, or republish any material from these publications, except as specified in the "Fair Use" section below.

Requests should include:

- (a) complete names of all authors as they appear in the NCME publication;
- (b) complete and correct title of the article;
- (c) name of the publication;
- (d) volume number and year;
- (e) exact page number or numbers to be produced;
- (f) a statement of the intended use of the material;
- (g) the number of copies to be reproduced; and
- (h) an indication whether there will be a charge to the users of the material.

All republished or quoted material must include a full reference to the source of the material, including the digital object identifier (DOI) when available. The following reference format is recommended:

Cizek, G. J. (2012). Defining and distinguishing validity: Interpretations of score meaning and justifications of test use. *Psychological Methods*, 17(1), 31-43. doi: 10.1037/a0026975 .

As a courtesy to authors, NCME requests that the republisher notify the author that their material will be reprinted and in what publication it will appear. Permission will be granted by NCME contingent upon the requestor receiving the permission from the author of the article when a major portion of or the entire article is to be used.

Specific Procedures and Exceptions

NCME considers the following to pertain to the concept of “fair use” as described in the Copyright Law of 1978:

- (1) Copying without permission from and without payment to the Council is allowed for the following:
 - Less than 400 words. Permission to reproduce tables, figures, quotations, and excerpts of less than 400 words from a single periodical article is automatically granted, but the page number(s) from which the original material is cited should be noted in the acknowledgment.
 - Single copy of an article or chapter. A single copy of an article, chapter, or any part thereof may be made by teachers for their scholarly research or use in teaching a class, and a single copy of an article may be made by libraries and archives for archival preservation.
- (2) Classroom Use. “Fair use” includes multiple copies (not to exceed more than one copy per pupil in a course) for use by a teacher. NCME normally grants permission upon written request; there is no fee for classroom use and no limit on the number of copies made. NCME requires a request to reproduce copies so that it may monitor restrictions of “fair use” of its material. These restrictions prohibit the following:
 - a cumulative effect, the result of recopying more than nine instances during one class term and copying more than one article from the same author or more than three articles from the same collective work; and
 - extensive reproduction and use of materials in lieu of purchasing NCME published periodicals, books, or anthologies.
- (3) Limited Quantity for Scholarly Purposes. For purposes such as criticism, comment, news reporting, scholarship, research, and teaching (see section on classroom use), NCME normally grants permission to reproduce up to five copies without charge. Written permission requests should come to NCME in order for the Council to assure that the reproduction lies within the realm of fair use. These considerations are:
 - The purpose and character of the use, including whether such use is for the commercial matters or for nonprofit educational purposes;
 - the amount of substantiality of the portion used in relation to the copyright work as a whole;
 - the nature of the copyright work; and
 - the effect of the use upon the potential market value of the copyrighted work.

Library Use

Reproduced entire works or a substantial part thereof will be granted to libraries without charge only if replacement copy cannot be purchased from NCME or the publisher at a fair price (single-copy sale).

Reproduction of articles and chapters in limited quantities will be considered on an individual basis. In general, NCME will not charge for reserve copies.

Authors

Authors of articles are automatically granted permission to reproduce their own material. No fee is charged to authors whose material appeared in periodicals. All or half the fee is waived for authors whose material appeared in works published under commercial contract, provided that, consistent with the items of that particular contract, proper credit is given to NCME and permission has been obtained from NCME.

Limitations

Permission will not be considered for use of materials in any but a forthcoming edition, translation, or revision of a given work. Requests to reproduce materials “in all future editions...” etc., will not be granted.

Requests for “blanket permission” will not be considered. However, the Council does not limit the area of distribution of the work in which the reproduced material is used.

Rates

Rates for the use of quotations and excerpts over 400 words may be obtained from the NCME Central Office.

Questions should be directed to the NCME Central Office.

9.10 Policy on publicizing events from outside organizations in NCME publications

NCME may publicize conferences, websites, calls for editorships or award nominations, and other events for organizations external to NCME, according to the following guidelines.

1. The organization must make a request in writing to the website editor. Requests received by the editors of JEM, EMIP, and the newsletter will be forwarded to the website editor. For the most part, publicizing of conferences, websites, calls for editorships or award nominations, and other events for organizations external to NCME will occur on the website and/or in the newsletter. Most such publicity will take the form of an event listing on a calendar or a brief announcement with links, as opposed to posting large portions of text from the outside organization.
2. Occasionally the journals (in addition to the website, where the request has been forwarded) may also respond to outside requests for publicity, but only if this results in no additional annual page charges for the journal. The decision to publish or decline a specific request and in what format will be made by the respective editor. The editor’s decision must conform to the substantive guidelines in points #3 through #5 and may also reflect other editorial considerations (for example, whether space is available in the requested issue, whether the copy is provided in usable form, whether the copy arrives in time to conform with production deadlines, and so on).
3. Organizations whose information may be published are limited to those whose work conforms with NCME’s mission, vision, and goals statement. This means (quoting from the mission and goals statement) that to be published in an NCME venue, the

organization must work to advance the science and/or practice of educational measurement. Organizations that do this will typically engage in support of one or more of the following types of activities: encouraging scholarly development of educational measurement; disseminating knowledge about educational measurement; ensuring sound and ethical measurement practices; influencing public policy concerning educational measurement; and promoting awareness of measurement in education as a field of study. Editors may interpret these activities broadly (for example, recognizing the contribution of sister disciplines like statistics and psychology to educational measurement), but a case must be made for advancing NCME's mission, vision, and goals.

4. Logos of outside organizations shall not appear on NCME's website or in NCME's publications. This requirement insures that NCME does not have to compete with other organizations' logos or branding and does not have to deal with properly representing other organizations' logos, property rights, or copyrights.
5. It is expected that organizations for whom publicity is provided by NCME will reciprocate in considering similar requests for publicity by NCME. The NCME website editor will request sister organizations to provide a link on their website to the NCME website and/or to specific web information about the NCME annual meeting, calls for editorships or award nominations, and/or other events, as appropriate.

10. Awards

Beginning with the 2006 annual meeting of NCME, several new procedures have been adopted for the administration of the NCME Awards that are described in this section of the Handbook.

First, a new review procedure for awards was proposed and approved by the NCME Board at their spring 2005 meeting. This procedure consists of the following steps. (An Ad Hoc Committee to review all aspects of the NCME Awards was convened in 2015, and recommended changes, some of which the Board approved. Those changes are incorporated into the text that follows.)

1. It will be the responsibility of all Awards Committee Chairs to fill out the form included in the Handbook attachments. The form is to be sent to the Board liaison by **1/30** of each year. The Board liaison forwards the form to the President of NCME who will, in collaboration with the NCME Executive Committee, review all recommended nominations.
2. Any concerns that the Executive Committee may have about a particular recommended nomination will be worked out through the NCME President with the appropriate committee chair.
3. A final decision about the award recipients must be made in time for the Award Committee Chairs to inform the respective winners by **2/20** of each year. The initial contact is followed by a letter from the President, following by a letter from the Central Office with a W-9 form.
4. Nominees who do not win an award should be contacted by the respective Award Committee Chairs by **3/1** of each year and informed about the decision for the current year and whether or not their nomination will be carried over to the following year.

Second, the NCME Board also agreed, at their spring 2005 meeting, that multiple awards will no longer be given to a single candidate in the same year, i.e., a candidate will only be eligible to receive a single award per award period. The language in the Calls was modified for 2012 to make it explicit that people should not be nominated for more than one NCME award that will be given

during the same annual meeting.

Third, an additional award policy agreed to by the NCME Board in the spring of 2005, is that no ties will be permitted for any of the awards. Only one award will be given to an individual, or group of individuals, annually for each of the awards described below.

Fourth, if there are multiple persons winning an award: (1) the monetary award is split equally among the winners; (2) multiple winners are invited to the breakfast, and each may bring one guest; and (3) refunds are not offered if the winner(s) have already purchased their breakfast tickets.

In 2011, the following policy was established with regard to conflict of interest on the part of award committee members: Members of award committees should recuse themselves from voting on award applications where there is a conflict of interest. It may not always be clear when a conflict of interest exists, given one of the duties of a committee member is to actively recruit award nominations. If a committee member feels s/he cannot provide unbiased evaluation for one or more award nomination, and/or if the award committee chair feels there is a conflict of interest (e.g., a Brenda H. Loyd Award committee member nominates his/her student's dissertation, or a member of the Alicia Cascallar Award committee nominates a paper on which s/he is a co-author), the committee member should be recused from voting on award applications. However, the committee member should participate in other award committee business. The Board Liaison should be contacted if there is any uncertainty about whether a conflict of interest exists.

The Handbook attachments include a timeline of tasks for the awards committees, information about each award, sample letters, calls for awards and other materials.

10.1 Descriptions of Awards

The table below summarizes the benefits for award recipients for each of the NCME awards. The nomination and application procedures, and eligibility requirements for each award are detailed in the sections that follow.

AWARD	Monetary Stipend	Invited to Speak at NCME Conference	Photo and Announcement in Breakfast Brochure	Photo and Announcement on Webpage	Breakfast Tickets
Alicia Cascallar	\$1,000	No	Yes	Yes	up to 2 per awardee
Annual Award	\$1,000	Typically no	Yes	Yes	up to 2 per awardee
Career Contributions	\$1,000	Yes--solo invited session	Yes	Yes	up to 2 per awardee

Brenda Loyd	\$1,000	Winner may be invited to be part of a session if winning dissertation has not be previously presented.	Yes	Yes	up to 2 per awardee
Jason Millman	\$1,000	Yes, winner will be invited to be part of a session	Yes	Yes	up to 2 per awardee
Bradley Hanson	\$1,250	Typically, no.	Yes	Yes	up to 2 per awardee

10.1.1 Alicia Cascallar Award for an Outstanding Paper by an Early Career Scholar

Alicia Cascallar, who published most of her work as Alicia P. Schmitt, is best remembered for her prolific work in the area of differential item functioning (DIF). The Alicia Cascallar Award for an Outstanding Paper by an Early Career Scholar has been established to honor Alicia’s professional commitment and accomplishments and to continue her practice of mentoring and encouraging promising new scholars in the area of educational measurement. An award of \$1000, a plaque, and reimbursement (or a waiver) of NCME conference fees will be provided as partial support for an early career member of NCME to travel to the annual meeting. The award will be given for the most outstanding paper by an early career scholar that is presented at one of the two NCME Annual Meetings that immediately precede the year of the award. For example, the 2012 award will be given for a presentation made at the 2010 or 2011 Annual Meeting.

Criteria for Eligibility

To be eligible for this award the individual must have presented a paper at one of the two NCME Annual Meetings immediately preceding the year of the award in a paper session or as part of a symposium or panel discussion. The author(s) must have received their doctoral degree within 5 years of the annual meeting at which the paper was presented. In addition, professional colleagues who believe that this work represents a significant contribution to the field of applied measurement must endorse the paper.

Nominations must include the following items.

1. A letter of nomination from a professional colleague who is a member in good standing of NCME.
2. At least one additional letter of recommendation (in addition to the nominator) is required.
3. All endorsements of the papers should list the reasons why this candidate’s paper represents an important contribution to the field of applied measurement.
4. The candidate’s current curriculum vita.

Papers will be evaluated for their scientific merit, clarity and completeness, the extent to which the material is redundant with previous publications and presentations, and the relevance of the work to practitioners in the field.

Application Procedures

After the Annual Meeting, the nominator will submit his nomination letter and the curriculum vitae of the candidate to the address of the Committee Chair. The letters of the other endorsees of the paper should be submitted to the Committee Chair under separate cover. The candidate will submit the paper electronically to the Committee Chair. This version should be the one that was submitted to the discussant(s) at the appropriate annual meeting of NCME.

For multi-authored papers, the nominee must be the first author or, if not the first author, the nominee must provide a statement that defines his/her unique contributions to the paper. All other co-authors must provide a statement indicating that these contributions were unique, added to the value of the paper, and constituted a major portion of the paper.

Deadline for submission is **November 1**, of each year. All materials must be submitted by this deadline date. Only complete sets of materials will be considered. The Committee will acknowledge receipt and notify the nominator and candidate if any materials are missing.

Nominators and other endorsers of the paper will submit their letters either by mail or e-mail to the Committee. The candidate will submit the paper electronically to the committee chair. Fax versions of papers will not be accepted.

Funding

This award is supported through an annual contribution of \$1,000. Funds for the award, plus the cost of the Annual Meeting Registration, will come from Alicia Cascallar Memorial Fund/PACF¹, 15 Princess Road, Lawrenceville, NJ 08648, until funds established for this award are fully expended.

10.1.2 Annual Award

The NCME Annual Award is established to recognize exceptional achievement in multiple categories. The yearly award may be given to recognize an outstanding book or publication addressing educational measurement concepts important to the public and the field during the previous three years (an award for 2015 would be for work completed after the 2012 Annual Meeting). The award could be given for outstanding *technical* or *scientific* contribution to the field of education measurement, which could include an application of technology, or innovative ways of solving practical and theoretical measurement problems, inventive instrument development techniques, creative testing procedures or products, and scientific contributions of measurement to research methodology. The award may also be given to recognize exceptional service, such as a practitioner might provide to a state, district, consortia, or client, or excellence in teaching. Exceptional service might include novel, technically sound methods of addressing real-world issues, facilitating data usage in making decisions, such as designing exceptionally informative

¹ The Princeton Area Community Foundation (PACF) is a 501© 3 non-profit organization, and contributions to the fund are tax-deductible to the fullest extent allowed by law. The PACF federal tax ID# is 52-1746234.

score reports, and so on. To be eligible for this award, the contribution must have occurred initially during the previous three years.

Awards are determined by the Annual Awards Committee. The “Call for Awards Nominations” is issued in *EM:IP*, among other publications. The recipient of the Annual Award receives a plaque and a \$1,000 cash payment.

Application Procedures

NCME members and others are encouraged to submit nominations. Self nominations are also encouraged. Individuals and groups are eligible for this award. A nomination consists of a 3-5 page statement summarizing the contribution. The materials should clearly describe and demonstrate the importance of the contribution to the field of educational measurement. Additional supporting documentation is also welcome. Materials should include the names and addresses of at least two persons familiar with the specific applications and its impact/results, the names and all contact information on all nominees. The committee may request further materials and may contact others who are likely able to evaluate the contribution.

10.1.3 Award for Career Contributions to Educational Measurement

The NCME Award for Career Contributions to Educational Measurement is to honor a person whose contributions over a career have had widespread positive impact on the field of educational measurement. These influential contributions might include theoretical or technical developments; ideas or conceptualization of information to the public about educational measurement that has widely influenced public understanding; and applications of theory through procedures, instrument, or program development that have influenced broadly the nature of measurement and practice.

The award is available annually although it does not have to be given each year. It consists of a plaque awarded at the annual NCME breakfast. In addition, the recipient is invited to present an address at the next Annual Meeting at a featured session honoring all previous winners.

A Committee is established to select the winner of the Career Award (See Committee Section). The Committee solicits from the membership by public announcement in *EM:IP* nominations in the form of one or two written page contributions plus a complete curriculum vitae. In addition, the Committee is expected to solicit nominations of persons it especially wishes to have the opportunity to consider. Award Committee membership requires that a committee member cannot vote or participate in the discussion of any nominations of the work from a member of his or her institution. In addition, if a Committee member’s work is to be considered, that person must resign from the Committee.

The recipient of the Career Award may receive a \$1,000 cash payment.

Application Procedures

To be considered, a nomination must include eight copies (or one electronic copy) of: (a) a 1-or 2-page summary of the nature, significance, and impact of the nominee’s contribution to the field of educational measurement and (b) an up-to-date copy of the nominee’s vita. Additional supporting documentation is also welcome. Nominations from one year are carried over for consideration for

up to four additional years. Updated materials (e.g., updated vitas, additional letters of recommendation) are encouraged for nominees who will be reconsidered, as long as materials are received prior to the deadline for the award in that year. Nominations are limited to living person, or, in unusual circumstances, to persons only recently deceased.

Eligibility Criteria

1. Overall impact of the individual's contributions to the field
 - through theoretical contributions to measurement methodology
 - through applied research that has influenced the work of many other researchers
 - through insightful analyses that have influenced the thought of measurement professional and policy makers
 - through the development of instruments that have set standards of excellence in testing
2. Scholarship in the field of measurement
 - through publications that have materially advanced the use of measurement in education and education-related contexts
 - through publications that have had a pronounced effect on measurement practices and research
 - through publications that have significantly advanced the measurement training of teachers, administrators, test developers, and others who use educational measurements in their daily work
 - through publications that have helped to resolve long-standing problems, addressed important social issues, attacked problems that few others have been willing or able to consider, or provided new and critical insights.
3. Service to the profession
 - through contributions to professional organizations, including service on committees, editorial activities, and office holding (with particular emphasis on NCME service)
 - through consultation, speaking, advocacy, recruitment, and willingness to accept the responsibilities of leadership

10.1.4 Brenda H. Loyd Outstanding Dissertation Award

The Brenda H. Loyd Dissertation Award was established to honor Dr. Loyd's work with graduate students in the field of educational measurement. Dissertations are evaluated on their significance of contribution to the field of educational measurement, quality of literature review, technical quality of research, and clarity of writing.

The recipient of the Dissertation Award receives a \$1,000 monetary award and a plaque. In addition, the advisor or committee chair for the top-rated dissertation receives a congratulatory letter.

Funding

Funding for the Lloyd award is housed in a designated fund within NCME's accounts. Monies to support the annual award are transferred by the Finance Manager from the designated fund to the general fund at the time the award is given.

Eligibility Criteria

Dissertations completed (degrees awarded) in the three years preceding the award are eligible for consideration. (For example, for the 2004 award, nominated dissertation must have been completed between July 1, 2000 and June 30, 2003.) The recipient of the award need not be a member of NCME; however, the student's advisor or dissertation committee member submitting the nomination must be a member of NCME. To nominate a dissertation, send the following as electronic files to the chair of the committee: (a) a letter of nomination from the author's advisor or member of his or her dissertation committee; (b) a summary of the dissertation research (up to 10 double-spaced pages not including references), including the rationale for the study, research questions, methodology, results and conclusions; (c) a table of contents (including figures and tables); and (d) a statement from the graduate school or registrar, or a copy of the diploma confirming the date of completion and acceptance of the dissertation. The criteria used by the committee include the contribution to the field of educational measurement, quality of the literature review, technical quality of the research and clarity of the writing.

10.1.5 Jason Millman Promising Measurement Scholar Award

Beginning in 2003, the National Council on Measurement in Education established the Jason Millman Promising Measurement Scholar Award. The award is designed to honor Dr. Millman's work by recognizing a scholar at the early stages of his/her career whose research has the potential to make a major contribution to the applied measurement field. In addition to recognition by NCME, the successful candidate will receive a plaque and \$1,000. Only one candidate will be chosen to receive the award each year.

Funding

Funding for the Millman award is housed at:

Arizona Community Foundation
2201 East Camelback Road, Suite 202
Phoenix, AZ 85016

At the time that the Millman award is determined, the foundation is to be contacted with information about the recipient and a request for payment. Any special requests from the granting organization should be accommodated.

Eligibility Criteria

To be eligible for the award in a given year, the candidate must:

- have received his/her doctorate within the last six years (for example, the recipient of the 2004 award would need to have received his/her degree between 1998-2003);
- have two (2) or more unique papers either accepted for presentation at an NCME annual meeting or published in NCME publications within the last five years; and
- have the support of his/her professional colleagues that his/her work represents a significant contribution to the field of applied measurement.

For full consideration candidates must submit one electronic file or hard copy of each of the following: (a) A letter of nomination from a professional colleague who is a member in good standing of NCME; (b) At least two letters of recommendation from individuals (other than the nominator) that speak to the candidate's contributions to the field of measurement as a teacher, and/or as an applied measurement practitioner, and/or as a measurement researcher; and the reasons for which the candidate's work represents a significant contribution to the field of applied measurement; (c) two or more unique papers presented at any of the last 5 NCME annual meetings, or published in the last 6 years in an NCME publication; d) The candidate's current curriculum vita; (e) a letter from the candidate outlining his/her career goals and how his/her work contributes significantly to the field of measurement.

- NCME annual meeting papers can be in a revised format.
- Unpublished or published dissertations do not qualify as a paper, although papers developed on the same or similar topics would qualify.
- The candidate must be the first author on all multiple-author papers. In this case, the candidate must provide a statement that defines his/her contributions to the paper.

The Committee will acknowledge receipt and notify the candidate if any materials are missing.

Application Procedures

Candidates may use more than one mode of delivery for submitting materials. One (1) copy is required for materials submitted electronically. One copy is required for materials submitted as hard copy. If some materials are submitted electronically and some by surface mail/package delivery, they must all be submitted on the same date. If more than one mode of delivery is used for the submission, the candidate must notify the Committee chair of the modes and expected date(s) of arrival. Submission dates and expected arrival dates must precede the deadline date.

10.1.6 Bradley Hanson Award for Contributions to Educational Measurement

Established for 2005, the Bradley A. Hanson Award honors Dr. Hanson who served the educational measurement profession as a scholar, practitioner, mentor, and developer of open source scientific software. The program annually awards a total of \$1,250 and a plaque, to a nominee or nominees in support of projects that promise to directly make a significant contribution to the field of educational measurement, and/or that promise to make a significant contribution to the development of new professionals in the field.

Funding

Donations to the Bradley A. Hanson Memorial Fund may be made payable to the Arizona Community Foundation and sent to:
Arizona Community Foundation
Bradley A. Hanson Memorial Fund
2122 E. Highland Ave., Suite 400
Phoenix, AZ 85016

Criteria for Eligibility

To be eligible for the award a candidate must (1) be a member of NCME or be a graduate student under the supervision of an NCME member; and (2) be working on a project that promises to make a significant contribution to the field of educational measurement and or a significant contribution to the development of new professionals in the field. Nominations, which describe both a project and a candidate recipient, will be evaluated by three criteria: (1) the importance of the project to be supported, (2) the importance of the financial award to the success of the project; and (3) the qualifications of the candidate and his or her ability to ensure the success of the project.

Application Procedures

Applications/nominations for the award must include the following:

1. A letter of nomination from a member in good standing of NCME. Self nominations/applications are welcome. The nomination letter must describe both the candidate and the project to be supported, addressing specifically the selection criteria detailed above.
2. At least one additional letter of recommendation (from person(s) other than the nominator) addressing the qualifications of the candidate and the importance of the project.
3. The candidate's curriculum vita.

Candidates may use more than one mode of delivery for submitting materials. One (1) copy is required for materials submitted electronically. Seven (7) copies are required for materials submitted as hard copy.

11. Special Projects

At the discretion of the Board of Directors, NCME can take on special projects. The Board must undertake such projects with a careful analysis of the financial implications. For example the Board

agreed to provide ERIC/AE with an address list of NCME Annual Meeting presenters so that ERIC can solicit papers, to provide complimentary copies of NCME publications to ERIC, to grant ERIC/AE permission to make fiche and hard copy available for all issues of *Measurement in Education*, to provide ERIC/AE complimentary copies of the membership directory and to provide a reduced rate to ERIC/AE for mail list rentals.

No specific policies exist concerning when special projects are to be funded from the regular budget or through special funding. However, when special funding is sought, the policy below applies:

11.1 Funding for Special Projects

NCME recognizes that many activities and products designed to improve the practice of educational measurement require more funds that can be comfortably expended from the financial resources of the organization. Thus, NCME may seek and receive monies from granting agencies in accordance with the following guidelines:

The activity should:

- a. be consistent with the purposes of NCME;
- b. contribute to the realization of the purposes of NCME; and
- c. be one that NCME is particularly well suited to conduct or develop.

The proposal should include provision for:

- a. freedom to conduct the activity, develop the product, and disseminate the results in ways that do not co-opt the Council;
- b. fiscal control and supervision of the project by the Executive Officer;
- c. distribution of monies through the Executive Officer upon receipt of appropriate disbursement Claims from the project staff
- d. review by the Board of Directors (or its designee) of any activity or product; and
- e. the opportunity for NCME to terminate (with proper reimbursement to the sponsoring agency) any ac

Earnings received from the conduct of the activity or sales of product should revert to NCME rather than to project staff.

The proposal must be approved by two-thirds majority of the Board of Directors before it is submitted to a funding agency.

Appendix F: Expense Reimbursement Form

NATIONAL COUNCIL ON MEASUREMENT IN EDUCATION

100 N. 20th Street, Ste. 400, Philadelphia, PA 19103
Phone: 215 461-NCME (6263) Fax: 215564-2175

REQUEST FOR PAYMENT

Expense Guidelines

The Council greatly appreciates the professional contributions of members' time and expertise on behalf of its programs and activities. It is the policy of NCME to reimburse individuals for all reasonable cost related to their work on NCME business. As a nonprofit organization, supported principally by member dues, individuals are to use discretion in spending Council resources. Travel policies are described on the reverse side of this form. It is recognized that circumstances may occasionally occur that will require flexibility. Thus, exceptions to a policy should be requested in advance, if possible, or explained with submission of the form.

Please indicate below specific expense items or fees. Also, please specify the NCME activity involved.

Note: Receipts are required for single items of more than \$15.00

Activity: _____ Reimbursement: _____ Advance: _____

DATE	DESCRIPTION	AMOUNT

TOTAL REQUESTED

\$ _____

PREVIOUSLY ADVANCED

\$ _____

BALANCE DUE PAYEE

\$ _____

Make check payable to (please print legibly)

Name: _____ Address: _____

I certify that the above information is correct, to the best of my knowledge.

Signature: _____

Date: _____

Executive Director Signature: _____

Date: _____

-Over-

Appendix G: Sponsorship Letter

December 2, 2015

Cynthia Schmeiser
President of the Education Division
ACT, Inc.
500 ACT Drive

Iowa City, IA 52243-0168

Dear Cynthia Schmeiser:

I am writing you on behalf of the National Council on Measurement in Education (NCME). Next April we will once again host our Annual Meeting and Training Sessions in New Orleans. The NCME Annual Meeting and Training Sessions offer a unique opportunity for attendees to join peers, scholars, authors, and measurement experts to share ideas and gain important knowledge.

I am writing you at this time to request your support by becoming an NCME Annual Conference sponsor. NCME is the preeminent organization for educational measurement, research and assessment and your contribution will help us continue to provide leading edge programming, training workshops for graduate students and professionals entering the discipline, and networking – social opportunities for attendees. Sponsoring organizations will be identified with other educational assessment and research organizations in supporting NCME programming and innovative training to graduate students and measurement professionals.

Your sponsorship will be recognized in several significant ways and will also assist NCME in advancing the science and practice in measurement and assessment in education.

Your logo will be displayed:

- On signage near the NCME Information Desk (visited by all attendees) and the NCME and AERA Division D Joint Reception (typically attended by 400+ members and guests)
- On the NCME Fitness Run/Walk t-shirts (approximately 100 participants)
- In the NCME Conference Program
- At the NCME Breakfast and Business meeting; the NCME President will thank all sponsors from the podium

Cost for sponsorship is \$2,000.

In addition to conference sponsorship, this year we are offering a promotional opportunity for your company at the annual meeting. NCME will have a 3' table top space available for you to display your company's promotional information. These table top display spaces will be located near the NCME information desk; members regularly drop by this location for materials and other information. The NCME information desk will be located right outside of the session rooms at the Westin New Orleans Canal Place.

The cost for this 3' table top display space is \$1,000. This offer is reserved for sponsors on a first come basis. Once we have received confirmation from you that you would like to participate, the NCME office will send you the final details on shipping and displaying your materials.

This year we are introducing several unique features to our Annual Meeting, including:

- A number of mentoring activities for graduate students, in collaboration with AERA's Division D.
- CCSSO-NCME joint invited session (which will be repeated at the Large Scale Assessment Conference) featuring leaders in the two common core state assessment consortiums, state testing directors from each consortium, and technical experts providing feedback on assessment design and implementation.
- The first invited session of the new NCME Committee on Assessment Policy Committee which will feature a discussion on issues related to linking common core state assessments produced by different state consortiums (which will be used to produce a white paper for policy makers).

In addition, we have many other new initiatives underway such as an enhanced on-line member directory that will allow searches by specialty or research area and geographical location, and an edited book series.. We hope you will be able to support NCME this year and allow us to continue to advance the science and practice of educational measurement and assessment through publications, conferences and other initiatives. Please make your contribution check payable to "NCME Annual Meeting Sponsorship." It should be sent by December 31st to the following address:

Joe Casey, CAE, Executive Director
National Council on Measurement in Education
100 N. 20th Street, Suite 400
Philadelphia, PA 19103

Please feel free to contact NCME at 215-461-6263 with any questions about sponsorship or table top displays. In addition, please contact me directly with any recommendations on how NCME can respond to the needs of assessment and measurement professionals, and provide additional value to sponsors and members. Thank you again for your continued support of NCME.

Regards,

Richard Patz
President, NCME

Rich.Patz@act.org

P.S. Please go to <http://www.ncme.org/> to see new content and updated information.

Appendix H: List of Corporate Sponsors (2011)

Company Name
ACT, Inc.
Alpine Testing
Applied Measurement Professionals, Inc.
Buros
CAVEON
CITO BV
College Board
Educational Testing Service
HUMRRO
Law School Admission Council
Measured Progress Inc.
Measurement, Inc.
National Board of Medical Examiners
National Council of State Boards of Nursing, Inc.
Pacific Metrics
Pearson Educational Measurement
Pearson VUE
Questar Assessment, Inc.

Appendix I: Sample Logos/Signage for Corporate Sponsorships

NCME Thanks Sponsors of the 2011 Annual Meeting



Appendix K: Bill Russell's Handy Hints for New Editors

Talk with outgoing editors as you can benefit from their experience; there's no need to reinvent the wheel. Ask for sample forms and letters, suggestions for reviewers and editorial boards, pitfalls to avoid, and opportunities or practices to pursue. Be assertive in calling the outgoing editors. If they don't call you, you should call them. Though conversations by phone are helpful, person-to-person talks, in the outgoing editor's office, are even more helpful. Try to arrange a meeting in the outgoing editor's office so that you can actually see files, forms, processes, and ask questions on the spot.

Outgoing and incoming editors should discuss the timing associated with transitions. The ideal is for the outgoing editor not to accept more manuscripts than can be published in his or her three-year term, plus possibly one additional issue or four to five articles. The extra issue frequently provides a cushion for the new editor that is highly desirable.

Outgoing editors typically are responsible for manuscripts for which they have initiated the review process. Thus, manuscripts that are in the pipeline (under review, revise and resubmit, etc.) are the responsibility of the outgoing editor. This should be factored into the calculations of when to redirect the flow of manuscript. Outgoing editors should write to all authors that have manuscripts in the review cycle and indicate a deadline for receipt of their manuscripts to be considered under their tenure. After that time, the articles will be forwarded to the new editor and treated as a new submission.

Generate a stable of reviewers. Resources include: Annual Meeting Program (Index), journals (indexes published annually), editorial boards, colleagues, R&D centers, diversity issues committee, etc. In addition, the Central Office can provide a list of members by areas of professional interests.

Decide on the function of your editorial board. (Some ideas are given in the sections on Editorial Boards and Editorial Board responsibilities that appear below). The possible responsibilities range from simple names on a masthead that occasionally provide the editor with advice on policy and direction for the journal to the other end of the continuum of board members reviewing all (or nearly all) manuscript submissions.

Form an editorial board. A slate must first be submitted to the Publications Committee for their review and comment. Editorial Boards should reflect the expertise requisite for the journal and the diversity of the field and its disciplines.

Editors and editorial boards serve for three-year terms.

It is a long-range goal of NCME to promote diversity in its programs and activities. Resources include the Committee on Diversity Issues and specialized rosters of the membership by areas of interest and demographic characteristics that can be generated by the Central Office.

Editors are responsible for the decision to accept or reject manuscripts.

Develop hard copy or electronic form letters, including letters of acknowledgment of receipt of manuscript, letters to reviewers, reminder letters/postcards, evaluation forms, and components of decision letters.

Think carefully about the review criteria and the instructions you provide to reviewers and the type of recommendations and commentary that they are asked to offer. An example of guidelines for reviewers is provided later in this manual.

Review the journal's editorial policy statement (see below). Any revisions should be discussed with the Publications Committee and must be approved by the NCME Board of Directors.

Discuss your editorial appointment with your appropriate supervisor (e.g., Manager, Dean, Department Chair) and other relevant persons at your business or institution. Negotiate support (e. g., release time, committee assignments, etc.) NCME's Executive Officer can write a letter to the Dean or other administrator if it would be helpful and appropriate to highlight the prestige and honor that accrues to your business or institution due to your appointment.

Discuss your budget with the Publications Chair and, if necessary, NCME's Executive Officer. The Board of Directors annually approves a budget for each editor; the editor can have input during the budget approval process. See the section titled Support for Editors below.

Review the material in this manual for ideas, relevant publication policy, and other information related to your publication.

When you receive a manuscript submission, send it to your reviewers. At least three blind reviews are recommended, but this number can be adjusted by each editor and his/her board.

Develop a tracking system to monitor the review process. (Software exists)

Maintain records concerning the response rate of reviewers. It will be useful to you and your successor.

Be conscious of the burden placed on reviewers; for example, the number of manuscripts that they are asked to review each year, and whether they are being asked to review manuscripts that are clearly not appropriate for the journal. Before sending manuscripts out to reviewers, editors should screen papers for the appropriateness for the journal, number of manuscript pages, and minimal level of quality.

Consider, as an option, electronic submissions and reviews.

You might ask your reviewers to involve colleagues or even students in the review process. It can be a valuable learning experience.

Authors are entitled to commentary on the merits of their submission. Reviewers should be instructed to provide such feedback that can be shared with authors.

As a professional courtesy, editors are urged to provide reviewers with copies of the decision letter and comments received from other reviewers of the manuscript.

Editors need not be reactive only to submissions received. Editors are encouraged to solicit manuscripts (a review of the Annual Meeting Program is an excellent source of potential manuscripts, as are papers presented at specialized conferences).

It is expected that manuscripts will be reviewed in a timely fashion. Authors should anticipate receiving a decision on their paper within two or three months. The acknowledgment letter should state the expected time frame.

The acceptance letter should indicate approximately when the article will be published. The Central Office would also like for you to request a copy of the final version of the paper in an electronic format.

Each journal (JEM and EM:IP) has a Managing Editor at the Central Office who is responsible for all facets of the work necessary to publish the journal (copy edit manuscripts, type specs, review page proofs, secure author copyright permissions, and all other aspects of production and distribution).

The Director of Publications at the Central Office is another person with whom you may wish to speak should you have concerns the managing editor is unable to address.

Editors need to indicate the order of articles in each issue. Most journal editors send an article planning sheet, a simple list of the issue's articles in the order in which they should appear, when they send manuscripts to the Central Office.

Editors should be aware of the page allocation for the journal. (See Page Allocations below). Some flexibility exists to vary the size of each issue consistent with the total number of papers allocated in each volume (generally four issues in the calendar year). The Managing Editor can provide you with guidelines on the conversion between the number of manuscript pages to printed journal pages.

Communicate with editors of other journals (or sections within a journal) about boundaries or appropriateness of articles for their respective journals. Every effort should be made to avoid duplication of "turf" as well as manuscripts falling between the cracks.

Be cognizant of the conflict of interest policies (e.g., an editor cannot publish an article in her/his journal).

Be knowledgeable about the grievance procedure and policies on publishing critiques of articles that have been published

and rejoinders (“right of reply”). (See below for relevant materials on these subjects.)

NCME journals do not have high acceptance rates. Don’t be discouraged if in the first batch of manuscripts you receive you do not find the quintessential paper of the decade.

Theme issues for some journals are highly desirable. You may appoint a guest editor for the special issue. Provide enough lead-time to let the guest editor solicit contributions and be sure the page limitations are noted at the outset. Submissions should be subject to the standard review process.

You may be invited to meet with the Publications Committee and/or the NCME Board during the Annual Meeting. The purpose of such meetings is to discuss issues, problems, challenges, etc., that you may be facing, to provide suggestions for improving NCME’s publications program, and to respond to concerns and suggestions made by others in attendance.

At any time you can contact the Chair of the Publications Committee to discuss issues that arise during your tenure.

Your work at times will be challenging, demanding, and (we hope) always personally rewarding.

Your professional contributions and responsibilities to the research community are extremely important and greatly appreciated.

APPENDIX L: FUND DEVELOPMENT COMMITTEE PLAN

NCME Fund Development Committee Five Year Plan

OVERVIEW

Planning for the Fund Development Committee's (FDC) work has been guided by the mission statement, NCME Handbook Section 5.6.7 description of the FDC's responsibilities, and initial plan/framework developed by the former Ad Hoc Committee for Developing a Charitable Giving Arm. Planning also has been informed by the Society for Industrial and Organizational Psychologist's (SIOP) model for fundraising and use of funds to support the organizational mission and by the model used by the American College for Veterinary Pathologists. As a result, the FDC has recommended the development of a NCME Mission Fund for voluntary contributions by NCME members, foundations, organizations, and other contributors. The mission statement (below) for NCME charitable giving activities was revised based on Board feedback, and the FDC description was approved in April 2013 with minor revisions for the NCME Handbook.

Mission Statement for NCME Charitable Giving Activities

"To provide donors with a means by which they can express tangible support for advancing NCME's mission in the science and practice of measurement in education and for recognizing students and junior scholars, researchers, and practitioners working in the field. This support would be tax-deductible and could consist of cash, book royalties, or other kinds of assets." While donated funds will be controlled internally by NCME, not by a Foundation established outside of NCME, donations to the Mission Fund may not be used for supporting NCME operational expenses or annual meeting costs.

Recent FDC Planning

Based on FDC discussions at its November 16-17, 2013, in-person meeting, there was agreement that activities planned for implementation would be divided into three phases:

- Phase 1: Immediate short term (IST, within 1-2 years for implementation)
- Phase 2: Short term (ST, within 2-5 years)
- Phase 3: Long term (LT, 5+ years)

In addition, three major areas for immediate FDC planning were discussed:

- Major categories and activities to be supported by the Mission Fund
- Types of donations, solicitations, and fundraising goals for the immediate, short, and long term
- High-level communications plan for supporting messaging about the major categories and activities to be supported by the Mission Fund, general and specific solicitations, and related publicity

Major Grant Categories and Activities for Mission Fund Support

We seek support to the Mission Fund that will provide for three priority funding categories: graduate students, early career professionals, and outreach activities. (See Appendix 1 for specifics regarding the activities to be funded, applicant eligibility criteria, and application and review processes.). The FDC will make recommendations to the Board annually regarding the distribution of funds from the Mission Fund to each of the three grant categories.

Category 1: Support for graduate students. The plan is to first fund specific activities in the short term; additional activities can be supported in the long term, as funds permit.

Category 2: Support for early career professionals. Similar to Category 1, specific activities will be targeted for funding in the short term, with additional activities supported in the long term, as funds permit.

Category 3: Support for outreach. Grants planned for outreach may only go to sponsor

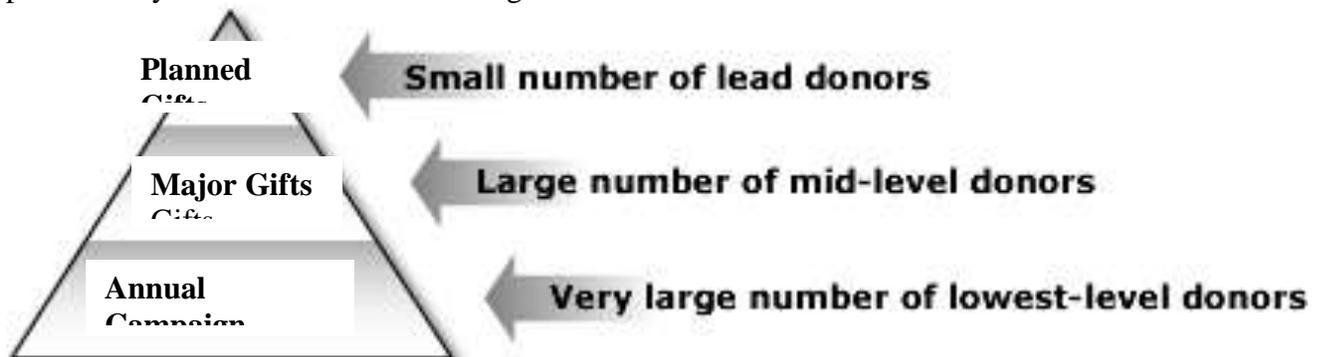
individuals or external programs that are not already being directed by other NCME committees. Activities proposed for funding in the short term are those that may require lower levels of funding than those that are proposed for the long term.

Donor Solicitation Plan

The donor solicitation plan also is divided into three phases (see Appendix 2 for more detail):

- Phase 1: Immediate Short Term (December 2013 – April 2016)
- Phase 2: Short Term (May 2016 – April 2019)
- Phase 3: Long Term (May 2019 and beyond)

Targeted audiences will be segmented for fundraising based on a three-tier pyramid model presented by Absolute Focus Consulting:



- First and largest tier of annual gifts (e.g., smaller but more numerous individual or event donations)
- Second tier of larger donations (e.g., corporate, loyal givers, simple bequests)
- Third and smallest tier of largest gifts (e.g., large bequests, planned gifts including distributions from trusts, endowments, life insurance, retirement accounts, real estate, stocks,, other tangible property) may require the assistance of a community foundation for some large gifts (e.g., property, trusts, stocks).

In the immediate short term, fundraising will focus on the first tier primarily, with expansion into the second tier in the short term, and addition of capacity to include the third tier in the long term. Donor recognition categories for various levels of support will be identified (e.g., Bronze, Silver, Gold, Platinum, Diamond OR other labels more reflective of NCME's work), if desired by the donor.

Start-up campaign (December 2013 – February 2014): Goal of \$15,000. Prior to general solicitation, a NCME Presidents’ Fund solicitation is proposed to provide start-up money for the inaugural year of the Mission Fund, with a goal of \$15,000 (average of \$500 from 30 past presidents) by March 2014.

Start-up Campaign					
Gift Pyramid \$15k goal					
Gift Level	# of Gifts Needed	Total	prospects needed (3:1)	Gifts Rec'd	Gift totals
\$2,500	1	\$2,500	3	1	\$2,500
\$1,000	4	\$4,000	12	4	\$4,000
\$500	10	\$5,000	30	10	\$5,000
\$250	12	\$3,000	36	12	\$3,000
\$100	7	\$700	21	7	\$700
Total	34	\$15,200	102	34	\$15,200

Immediate Short Term (March 2014 – April 2016): Goal of \$40,000. Potential sources include a solicitation of members before and/or during NCME annual meetings starting in 2014 (e.g., Breakfast and information booth, NCME website link) and adding donation options into the membership renewal form in fall 2014. Other solicitations may target past NCME board members, corporate donors, options to donate in memorial and other tributes.

Start-up Campaign					
Gift Pyramid \$40k goal					
Gift Level	# of Gifts Needed	Total	prospects needed (4:1)	Gifts Rec'd	Gift totals
\$1,000	2	\$2,000	8	2	\$2,000
\$750	5	\$3,750	20	5	\$3,750
\$500	15	\$7,500	60	15	\$7,500
\$250	25	\$6,250	100	25	\$6,250
\$100	50	\$5,000	200	50	\$5,000
< \$100	Many	\$15,500	Many		\$15,500
Total	97	\$40,000	388	97	\$40,000

Short Term (May 2016 – April 2019): Goal of \$150,000. Efforts established in the short term will continue, with a focus on increasing the size of gifts from these donors, as well as adding special fundraising events at the annual meetings. Other effort will focus on developing gifts from targeted foundations (e.g., Gates Foundation).

Start-up Campaign
Gift Pyramid \$150k goal

Gift Level	# of Gifts Needed	Total	Prospects needed (4:1)	Gifts Rec'd	Gift totals
\$50,000	1	\$50,000	4	1	\$50,000
\$25,000	1	\$25,000	4	1	\$25,000
\$10,000	2	\$20,000	8	2	\$20,000
\$5,000	5	\$25,000	20	5	\$25,000
\$2,500	10	\$25,000	40	10	\$25,000
\$1,000	10	\$10,000	40	10	\$10,000
Total	29	\$155,000	116	29	\$155,000

Long Term (by or before April 2019): Goal (not yet determined). In the long term, efforts will include development of large bequests and planned gifts (TBD).

Communication Plan

The communication and publicity plan tracks with types of donors to be solicited and grant activities to be supported during the major implementation phases (see Appendix 3 for more detail). Messaging will be targeted both generally and to specific groups solicited for donations. The plan provides key messaging points for these various types of donors, how they will be contacted, and who will be contacting them and when, with notes on needs and requirements for implementation.

Potential target groups. In the start-up phase, NCME past presidents will be targeted. In the immediate short term phase, a variety of solicitation and publicity communications will be tailored to other groups including, for example:

- (Immediate short term) – all NCME members, past NCME board of directors, NCME sponsor organizations, measurement programs at academic institutions
- (Short term) – foundations

Messaging. Examples of messaging used through the immediate short term (April 2016) include:

- NCME is establishing a Mission Fund for voluntary contributions
- Mission Fund will support mission-driven activities and may not be used to support NCME operational expenses or annual meeting costs
- Support of past presidents, along with the current and incoming presidents, will be used to demonstrate importance of Mission Fund and to inspire NCME members to donate
- Why fund is important – to further mission, increase NCME visibility and impact on issues in measurement and education
- 2014 fundraising goal

How target groups will be contacted. Examples of approaches for contacting potential donor groups starting in February 2014 through the immediate short term in April 2016 include:

- Email and follow-up phone call
- Email and letter from president

- Targeted mailings
- NCME newsletter article and EM:IP advertisement
- Brief presentation at Breakfast, flyers at Breakfast, signage at conference
- Description and link on website
- Personal visits

Integrating, Aligning, Sequencing, and Revising Overall FDC Plan and Major Components

Based on feedback from the Executive Committee on 12/11 and internal FDC communications, a first draft of the FDC's plan of activities follows. It attempts to integrate, align, and sequence the major planning areas and activities through April 2016 (Phase 1 - immediate short term) and then through April 2019 (Phase 2 - short term) and beyond (Phase 3 – after April 2019). Of primary focus is development of details for Phase 1 (February 2014 – April 2016). Given the Executive Committee's approval of the expenditure for Executive Consulting Services proposed by Absolute Focus Consulting, expert review and feedback on the plan from these consultants will be sought on this first and subsequent drafts of the plan.

PLAN OF ACTIVITIES

Prior to activities planned for Phase 1 (February 2014 – April 2016), the FDC will be seeking NCME Board approval/feedback on the following action items, prior to the planned start/implementation of each:

- Three major categories for activities to be supported by the Mission Fund
- Activities to be supported within each of the three priority categories during Phase I, as funds permit (e.g., if \$15,000 raised, support: 5, \$750 travel grants for graduate students to attend NCME meeting [Category 1]; 5, \$750 travel grants for early career professionals to attend NCME meeting [Category 2]; 1, \$2,000 grant for domestic or international project intended to enhance proper test use and test results [Category 3]; 1, \$1500 travel grant to bring head of international education ministry to NCME annual meeting [Category 3]; 1, \$2,000 grant for project to expand measurement knowledge into other fields, such as teacher education [Category 3]; etc.)
- Fundraising goal for each donor solicitation campaign prior to planned implementation
- Donor categories based on levels of support to Development Fund [*Would there be a permanent listing of charter donors (those donating at certain levels within first two years) as part of content developed/maintained on website?*]
- Methods and mechanisms for collecting, accepting, and acknowledging donations (starting February 2014)
- Concept, message, and procedures for Presidents' Fund Campaign (starting February 2014)
- Concept, message, and procedures for Mission Fund Kickoff with Members (starting March 2014)
- Concept, message, and procedures for Board of Directors' Fund Campaign (starting April 2014 after Annual Meeting)
- Concept, message, and procedures for NCME Sponsor Organizations Campaign (starting April 2014 after Breakfast)
- Concept, message, and procedures for Measurement Programs at Academic Institutions (starting April 2015 after Annual Meeting)

Phase 1

Assuming Board approval to begin Phase 1, the FDC will report on funds raised to date at the April 2014 and each subsequent Board meeting. Initially, based on funds raised by the end of May 2014, the FDC may make a tentative projection of the number of grants/activities that may be funded within each of the three categories before the 2015 Annual Meeting. The

announcement of the grants/activities to be supported and criteria and procedures for applying for these grants would be approved at the October Board meeting and then posted on the NCME website. The actual number of grants to be funded would be approved at the January/February 2015 Board meeting and announced/disseminated at the 2015 Annual Meeting. This cycle would repeat in the following year, starting after the 2015 Annual Meeting through the 2016 Annual Meeting, with requests of prior year donors to increase the size of their gifts in the second year.

Overview of Schedule

Before/by April 2014 Board Meeting:

- Board action items needing approval (see above) before April 2014 Board meetings at Annual Meeting approved in January
- Presidents' Fund Campaign launched
 - Private donor link for presidents posted in members section of NCME website (link only sent to past, current, and incoming presidents), along with directions and form to accept donations (credit card or check) via web or mail Letter for Presidents' Fund work group to contact other past presidents to donate
 - Thank you/acknowledgment and wording for tax status of donations
- Letter, publicity brochures, signage, website content developed and circulated before and during Annual Meeting about Development Fund and giving opportunities
- Membership Campaign launched
 - Private donor link for members posted in members section of NCME website (link publicized in member communications and other publicity)
 - Letter from Wim emailed to members after January meeting, announcement in EM:IP and Newsletter, etc.
 - Publicity, signage, and flyers at NCME Breakfast and Information Booth
 - Donation/pledge cards distributed and collected at NCME Breakfast
 - Donations from members also can be accepted at NCME Information Booth throughout conference (via two iPads and credit card scanner), with "Donor" ribbon for badge
 - Thank you/acknowledgment and wording for tax status of donations sent to all donors
 - Content for main (public) webpage with 24/7 donation link approved by Website Management Committee (may be implemented sometime after 2014 Annual Meeting)

Before/by July 2014 Board Meeting:

- Board approves items needing approval before next Board meeting
- Report on donations received to date by donor source and funding category and estimated number of grants to be supported within each of the three categories (each Board meeting).
- Appointment of Subcommittees for each of three grant categories
-

Before/by October 2014 Board Meeting:

- FDC recommends grants/activities to be supported and subcommittee-recommended criteria and procedures for applying for these grants for Board approval and for posting on the NCME website

Before/by January 2015 Board Meeting:

- Board approves number of grants to be funded/disseminated (as recommended by each subcommittee to FDC) by/before April 2015 Annual Meeting

Before/by April 2015 Board Meeting:

- Announcement/dissemination of grants funded made at Annual Meeting Breakfast

Before/by July 2015 Board Meeting:

Before/by October 2015 Board Meeting:

Before/by January 2016 Board Meeting:

Before/by April 2016 Board Meeting:

Phase 2

[Overview paragraph for Phase 2]

Phase 3

[Overview paragraph for Phase 3]

Appendix 1

Activities Supported by the Mission Fund

Contributions are made to a Mission Fund and will be disseminated annually to the three funding categories as determined by the Fund Development Committee based on the amount of funds available. In order to encourage NCME membership to contribute to the Mission Fund, activities that are funded will focus initially on those categories of highest interest to the membership (that is, funding activities that will be viewed as “quick wins”). Three Selection Subcommittees will be appointed, one for each category; the awarding of funds from each category will be determined by the Subcommittee.

Category 1. Support for graduate students

To qualify for grants from this category, applicants must be a student member of NCME, attending a doctoral or master’s graduate program in the field of educational or psychological measurement full-time, and be in good standing at the institution. These funds are above and beyond existing funds at universities, graduate programs, and/or other organizations that are used to support graduate students and should not be used to decrease awards, reallocate awards, or decrease overall funding for graduate students at institutions and/or organizations. Institutions and/or organizations willing to provide matching funds for awards made to their students will allow more awards to be made to other students.

Activities Funded. Short term activities eligible for funding may include:

- NCME
- (a) Travel grants to attend the NCME annual meeting or to conferences outside of professional development
 - (b) Grants for other types of educational opportunities that requires fees for registration or travel expenses, such as attendance at NCME training sessions or seminars held at universities or other organizations
 - (c) Grants for purchases of books, software, other course materials

Additional activities may be added in the long term, as funds permit. These include:

- (a) Dissertation research support
- (b) Funding for internships/mentorships, such as providing summer internships at various organizations or state departments
- (c) Funding for master’s students who are not receiving support from their program or University

Application Process. To receive a grant, the following process is followed:

- 1. Applicant completes the application.** The application includes:
 - Applicant’s name, institution, graduate program, address, and email address
 - Advisor’s name, institution, graduate program, address, and email address
 - Statement (maximum 2 pages) as to why the applicant should be chosen for grant
 - Statement (maximum 2 pages) of the applicant’s research interests
 - Brief budget showing how the funds will be used
 - Applicant’s short (maximum 2 pages) vitae.

2. **Applicant submits application materials to his/her advisor.** The advisor (1) verifies that the student is a member of NCME and is in good standing at the university and (2) provides a short (maximum 2 pages) letter of support.
3. **Advisor forwards all application materials to Selection Subcommittee.** Selection Subcommittee reviews each application with consideration given to students who are receiving limited or no other form of support. The strength of applicants' statements as to why they should be chosen for the grant and their research interests as well as the advisor's support letter is also considered by the Selection Subcommittee.
4. **Selection Subcommittee submits recommendations to Board for final review and approval.** Once approved by the Board, grant monies are issued using mechanisms already in place for other grants.

Category 2. Support for early career professionals

To qualify for grants from this category, applicants must be a member of NCME, have received their doctorate within 5 years of the application deadline, and been working in the field at a professional level, either in academia or outside of academia, **for no more than 5 years** from the date of the application. As with support for graduate students, funds will not be disseminated in cases where graduate programs and/or other organizations have monies to support the individual early career professional.

Activities Funded. Short term activities eligible for funding may include:

- NCME
or other
sessions,
- (a) Travel grants to attend the NCME annual meeting, to conferences outside of for professional development, or to participate on an invited panel requested presentations that are not part of a conference
 - (b) Grants for other types of educational opportunities that require fees for registration or travel expenses, such as attendance at NCME training seminars held at universities or other organizations, or National Center on Education Statistics (NCES) or National Science Foundation (NSF) type workshops
 - (c) Grants for purchasing specialized software or books

Additional activities may be added in the long term, as funds permit. These may include:

- (a) Providing support for a graduate student that will give research support to the faculty member
- (b) Funds to "buy out" a class to allow the faculty member to focus on research
- (c) Providing a summer salary so that research can be continued by the faculty member

Application Process. To receive a grant, the following process is followed:

1. **Applicant completes the application.** The application includes:

- Applicant's name, institution, graduate program, address, and email address
 - Statement as to why the applicant should be chosen for grant
 - Brief budget showing how the funds will be used
 - Applicant's short (maximum 2 pages) vitae.
2. **Applicant forwards all application materials to Selection Subcommittee.** Selection Subcommittee reviews each application. Committee also considers the strength of applicants' statements as to why they should be chosen for the grant and their research interests.
 3. **Selection Subcommittee submits recommendations to Board for final review and approval.** Once approved by the Board, grant monies are issued using mechanisms already in place for other grants.

Category 3. Support for outreach activities

Grants for outreach activities are expected to be awarded only to individuals or programs external to NCME; these monies are not intended to fund activities that are being directed by other NCME Committees. Individual international recipients, such as graduate students or other individuals, do not need to be NCME members to receive a grant. Some of the activities supported with funds from this category should be considered long term since they may require a level of funding that may not be supported immediately.

Activities Funded. Short term activities eligible for funding may include:

- (a) Travel grants to bring heads of international education ministries, other professionals,
OR graduate students studying in international measurement-related programs to the NCME annual meeting
- (b) Support activities that expand measurement knowledge into graduate programs where measurement knowledge is important but not necessarily taught (such as teacher training programs, psychology programs, etc.), including travel grants to allow graduate students from these programs to attend the NCME annual meeting
- (c) Support activities that disseminate measurement knowledge both domestically and internationally, such as supporting the expanded use of technology, translating important documents (such as the professional standards) into multiple languages, creating alliances with other international measurement organizations such as the European Association for Language Testing and Assessment (EALTA) and the Language Testing Research Colloquium (LTRC), and projects that are aimed at enhancing proper test use and interpretation of test results

Additional activities may be added in the long term, as funds permit. These may include:

- (a) Support activities that build the pipeline for the measurement field, such as efforts with undergraduates to encourage them to enter measurement field

and activities aimed at specific subgroups with the goal of diversifying the field

- (b) Provide funds to graduate programs to help them attract undergraduates into their measurement programs; this effort should also involve graduate students that are already in the program
- (c) Support the development and maintenance of a program within NCME or in partnership with other organizations aimed at helping undergraduates understand what the measurement field is about

Application Process. To receive a grant, the following process is followed:

1. Applicant completes the application. The application includes:

- Applicant's name, institution, graduate program, address, and email address
- Description of the activity that will be supported with the grant and its relevance to NCME
- Brief budget showing how the funds will be used
- Applicant's short (maximum 2 pages) vitae

4. Applicant forwards all application materials to Selection Subcommittee.

Selection Subcommittee reviews each application with consideration given to the alignment of the activity with NCME's priorities.

5. Selection Subcommittee submits recommendations to Board for final review and approval. Once approved by the Board, grant monies are issued using mechanisms already in place for other grants.

Appendix 2

NCME Fund Development Committee – Donor Solicitation Plan

The Donor Solicitation Plan is divided into three phases: Immediate Short Term (December 2013-April 2016); Short Term (May 2016-April 2019); and Long Term (May 2019 and on). An NCME Past President fund is proposed to kick off the fundraising efforts and to demonstrate to the NCME membership formidable commitment to the NCME Mission Fund.

The fundraising sources that are proposed are based on a 3-tier pyramid model recommended by Absolute Focus Consulting. The first, and largest, tier is comprised of annual gifts which typically are smaller individual donations and event donations. The second tier is comprised of donations which typically come from corporate contributions, loyal givers, and simple bequests. The top tier, which is the smallest, is comprised of large outright gifts, large bequests and planned gifts, including estate planning, IRA beneficiaries, trusts, endowments, life insurance, wills, gifts of property, and other tangible property. Typically a community foundation handles gifts in these categories.

The immediate short term phase will primarily target fundraising sources in the first tier, the short term phase will target the sources in the first and second tier, and the long term phase will target sources in the first and second tiers as well as some sources in the third tier. This proposal focuses on the first and second phase (December 2013-April 2019). The third phase, which may begin before April 2019, will be developed at a later date and may require a community foundation to handle property gifts, trusts, stocks.

It is the intent that donations will go towards a Mission Fund supporting graduate students, junior professionals, and outreach activities described by the NCME Fund Development mission, however large donations (over \$10,000) may be targeted to a specific area within the NCME Mission Fund mission.

Donor categories that represent individuals who have pledged their support to the Mission Fund at various levels will be identified, such as Bronze (up to \$250), Silver (\$250 to \$999), Gold (\$1,000 to \$2,999), Platinum (\$3,000 to 4,999), and Diamond (more than \$5,000). (The FDC will be considering other labels more descriptive of NCME's work, as part of its messaging efforts.)

Prior to General Solicitation – December 2013 – February 2014 - Goal is \$15,000*

- NCME Presidents' Fund – request up to \$1,000 from each President prior to the 2014 Annual Meeting – provides start-up money for the inaugural year of the Mission Fund

* Goal is based on 30 Past Presidents with an average donation of \$500

Immediate Short Term – March 2014-April 2016 - Goal is \$40,000*

A number of funding sources are considered for the immediate short term, including the NCME Past Board Members, NCME annual meeting breakfast and information booth, NCME membership renewal form, NCME website link, corporate donors, and memorial and other tributes. An array of gift sizes will be offered, and donors will be asked to increase their gift size during the second year.

March 2014- March 2016

March 2014

- NCME Past Board Members

April 2014

- NCME Annual Meeting Breakfast and Information Booth

December 2014

- NCME Membership Renewal Form

April 2014-March 2015

- NCME Website link for donation (open to members as well as non-members)
- Organization Donors (e.g., ETS, ACT, Pearson)

April 2015 and April 2016

- NCME Annual Meeting Breakfast and Information Booth
- Events at the Annual Meetings (After Run Charitable Activity, Fundraising Dinner, Silent Auction, Purchase of Signed Books, etc.)

April 2015-March 2016

- NCME Membership Renewal Form
- NCME Website link for donation (open to members as well as non-members)
- Corporate donors (e.g., ETS, ACT, Pearson)
- Memorial and other Tributes - A donation can be in honor of someone or the funder and the funder may specify the area of research, or donations can be made to the general program. If a grant or scholarship is established as a gift in honor/memory of an individual, a minimum donation of \$10,000 is needed.

* Goal is based on approximately 100 past board members donating, on average, \$100 (\$10,000), 500 NCME members donating, on average, \$50 (\$25,000), and corporate sponsors donating \$10,000 over a two year period, charitable events at the April 2015 and April 2016 annual meeting (\$5,000)

Short Term – May 2016-April 2019 - Goal is \$150,000*

All of the funding sources initiated in the immediate short term phase will continue into the short term phase, including the NCME Past Board Members, NCME annual meeting breakfast and information booth, NCME membership renewal form, NCME website link, corporate donors, and memorial and other tributes. There will be a concentrated effort in the short term phase to increase the size of the gifts from these donors and in addition to solicit monies from foundations such as the Gates Foundation

May 2016-April 2019

- NCME Membership Renewal Form
- NCME Website link for donation (open to members as well as non-members)
- Organization Donors (e.g., ETS, ACT, Pearson)
- Memorial and other Tributes - A donation can be in honor of someone or the funder and the funder may specify the area of research, or donations can be made to the general program. If a grant or scholarship is established as a gift in honor/memory of an individual, a minimum donation of \$10,000 is needed.

- **Foundation Donors (e.g., Gates Foundation)**

April 2017, April 2018, and April 2019

- NCME Annual Meeting Breakfast and Information Booth
- Events at the Annual Meetings (After Run Charitable Activity, Fundraising Dinner, Silent Auction, Purchase of Signed Books, etc.)

May 2016 – April 2019

- NCME Membership Renewal Form
- NCME Website link for donation (open to members as well as non-members)
- Corporate donors (e.g., ETS, ACT, Pearson)
- Memorial and other Tributes - A donation can be in honor of someone or the funder and the funder may specify the area of research, or donations can be made to the general program. If a grant or scholarship is established as a gift in honor/memory of an individual, a minimum donation of \$10,000 is needed.

* Goal is based on approximately 100 past presidents and board members donating, on average, \$300 (\$30,000), 700 NCME members donating, on average, \$100 (70,000), and corporate sponsors donating \$20,000 over a three year period, charitable events at the April 2017, 2018, and 2019 annual meeting (\$10,000), and foundation donations (\$20,000)

Long Term – May 2016-April 2019

During the long term phase, if not sooner, an additional target will be large bequests and planned gifts.

Appendix 3

***** Draft *****

12/9

Communications Plan for NCME Mission Fund

Target	Message	Medium	Who delivers by when	Notes
<p>1.NCME Past Presidents</p>	<ul style="list-style-type: none"> • NCME is establishing a Mission Fund • Mission Fund will support mission driven activities that cannot be funded out of funds collected for NCME operations • There is opportunity for past presidents to establish a charter fund, the NCME Presidents Fund • Donations from past presidents will be used to support initial funding efforts of NCME Mission Fund • Support of past presidents will be used to demonstrate importance of NCME Mission Fund to NCME members 	<p>e-mail and follow up phone call</p>	<p>Wayne Camara, Linda Cook, Anne Fitzpatrick, Dave Frisbie, Suzanne Lane, Barbara Plake Prior to 2014 Annual Meeting</p>	<ul style="list-style-type: none"> • TRG developed Website so that past presidents can donate online • TRG developed wording for tax status of donations
<p>2. NCME Past Board of Directors</p>	<ul style="list-style-type: none"> • NCME is establishing a Mission Fund • Mission Fund will support mission driven activities that cannot be funded out of funds collected for NCME operations • There is 	<p>e-mail and follow up phone call</p>	<p>Selected group of past Board of Directors Immediately following 2014 Annual Meeting</p>	<ul style="list-style-type: none"> • TRG developed Website so that past directors can donate online • TRG developed wording for tax status of donations • Need to obtain group of past directors to carry out solicitation

	<p>opportunity for past directors to establish a charter fund, the NCME Board of Directors Fund</p> <ul style="list-style-type: none"> • Donations from past directors will be used to support initial funding efforts of NCME Mission Fund • Support of past directors will be used to demonstrate importance of NCME Mission Fund to NCME members 			
<p>3. All NCME Members</p>	<ul style="list-style-type: none"> • NCME is establishing a Mission Fund • Mission Fund will support mission driven activities that cannot be funded out of funds collected for NCME operations • Why fund is important—further mission—increase NCME visibility—greater impact on issues in measurement and education • Examples of what funds will be used for • Examples of how funds will be raised—members, corporations, wills, trusts, etc. • Goals for fundraising, short term, long term 	<p>e-mail and letter from NCME President</p> <p>NCME Newsletter Article</p> <p>Short presentation</p>	<p>Wim--- communication goes out immediately following January Board meeting</p> <p>Article inserted in spring 2014 newsletter. L. Cook will draft</p> <p>L. Hargrove</p>	<ul style="list-style-type: none"> • L. Cook will develop text for FDC and EC review • TRG sent out e-mail and letter • TRG developed website so that members can donate online—how should we involve website committee • TRG developed a way for members to donate when they renew membership • Need to find out when text needs to be prepared for publication in spring newsletter • The FDC will not be prepared to handle bequests, money left in wills,

	<ul style="list-style-type: none"> • Past Presidents Fund • How can members contribute? Describe various methods including trusts, wills, etc. • Support the NCME Mission Fund • Past Presidents have donated \$xx to support this fund • 2014 fund raising goal • What 2014 funds will be used for 	<p>at 2014 Breakfast</p> <p>EM:IP advertisement (spring 2014)</p> <p>Signage at 2014 Breakfast</p> <p>Blurb on web—click on link and get full description</p> <p>Flyers on 2014 Breakfast Tables</p>	<p>L. Cook will draft text</p> <p>L. Cook drafted text for TRG</p> <p>L. Cook will draft text (prior to 2014 Breakfast)</p> <p>L. Cook will draft text (prior to 2014 Breakfast)</p>	<p>trusts, stocks, etc. when fund is initially established. How should this aspect of the Mission Fund be described to our members. Should it be described at all until we are ready to receive funds in this manner—probably 2016. Collecting these types of funds will most likely require hiring a qualified individual or using the services of a foundation to handle the taxation and legal aspects of this work.</p> <ul style="list-style-type: none"> • L. Hargrove will draft, need to let Wim and TRG know to include presentation on agenda • Should appear in spring EM:IP—need to find out when text for this edition is needed • Need to let TRG know this needs to be prepared • Need to discuss preparation and uploading with Website committee
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3. NCME Sponsor Organizations	<ul style="list-style-type: none"> • Thank you for past contributions to our Annual Meeting • We are asking you to increase your level of contribution • NCME is establishing a Mission Fund • Mission Fund will support mission driven activities that cannot be funded out of funds collected for NCME operations • Why fund is important—further mission—increase NCME visibility—greater impact on issues in measurement and education • Examples of what funds will be used for • Examples of how funds will be raised—members, corporations, wills, trusts, etc. • Goals for fundraising, short term, long term • Past Presidents Fund • Provide sponsors with targets for giving • Explain how sponsors can contribute? 	<p>e-mail and letter from the NCME President</p> <p>Follow up e-mails and phone calls</p>	L. Cook will draft text Members of FDC worked with TRG to manage solicitation (immediately following 2014 breakfast)	<ul style="list-style-type: none"> • Will need to consider message to sponsors carefully—think we should set funding target at \$5k from each organization—do we want to offer special funding opportunities?
4.	<ul style="list-style-type: none"> • Who is NCME— 	NCME	FDC will be	<ul style="list-style-type: none"> • Need to develop a

<p>Foundations</p>	<p>why our work is important</p> <ul style="list-style-type: none"> • NCME is establishing a Mission Fund • Mission Fund will support mission driven activities • Why fund is important—further mission—greater impact on issues in measurement and education • Examples of what funds will be used for • Examples of how funds will be raised—members, corporations, wills, trusts, etc. • Goals for fundraising, short term, long term • Past Presidents Fund • Provide Foundations with targets for giving • Explain how foundations can contribute? 	<p>website Targeted mailings Phone calls Personal visits</p>	<p>responsible for developing a plan for foundational giving. Plan will involve e-mail/letters/ phone calls/personal visits by FDC members and members of NCME Board (This campaign will not be launched until after 2016 Annual Meeting)</p>	<p>list of potential foundations and contact information for each foundation</p> <ul style="list-style-type: none"> • FDC will need guidance from consultants to determine how best to do this
<p>5. Measurement programs at academic Institutions</p>	<ul style="list-style-type: none"> • Who is NCME—why our work is important • NCME is establishing a Mission Fund • Mission Fund will support mission driven activities • Why fund is important—further mission—greater impact on issues in measurement and 	<p>Targeted mailings Phone calls Personal visits</p>	<p>NCME President NCME Board members (This campaign should be launched after the 2015) Annual Meeting</p>	<ul style="list-style-type: none"> • A list of measurement programs at academic institutions and contact information will need to be developed

	<p>education</p> <ul style="list-style-type: none">• Examples of what funds will be used for• Examples of how funds will be raised—members, corporations, wills, trusts, etc.• Goals for fundraising, short term, long term• Past Presidents Fund• Provide institutions with targets for giving• Explain how institutions can contribute?			

**NATIONAL COUNCIL
ON MEASUREMENT
IN EDUCATION**

**STRATEGIC BUSINESS
PLAN**

FINAL DRAFT – March 8, 2007

Compiled by
JFB & Associates, LLC

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SECTION I: EXECUTIVE SUMMARY

The National Council on Measurement in Education (NCME) is a professional organization for individuals involved in assessment, evaluation, testing, and other aspects of educational measurement. Members are involved in the construction and use of standardized tests; new forms of assessment, including performance –based assessment; program design; and program evaluation.

NCME members include a diverse set of stakeholders including university faculty; test developers; state and federal testing and research directors; professional evaluators; testing specialists in business, industry, education, community programs, and other professions, etc.

The founding purpose of NCME is to ‘encourage study, improve the practice, elevate and establish standards, advance the science in the field of measurement techniques and instruments in education, and the procedures appropriate for their development, administration, scoring, interpretation and use’. Dissemination of knowledge relative to the founding purpose to educators and educational institutions continues to be a relevant activity of NCME. NCME’s current working mission statement is to **Advance The Science and Practice of Measurement in Education.**

The primary purpose of NCME has not significantly changed since its incorporation. During the past twenty years NCME membership has become more diverse, broadening the scope of the organization’s vision. Service to communities and ensuring that assessment is fair and equitable for all students have become essential elements of NCME’s mission and purposes. What has changed, however, is the environment in which the NCME works.

In the November 2006 planning session the NCME leadership identified a future vision that positions the NCME as a recognized industry leader with a broad stakeholder audience, as a recognized national expert in educational measurement and testing, as a national forum for resources, and as providing a strong professional identity for its members.

Critical to NCME’s future will be the establishment and implementation of a strategic plan that provides strategies and timelines for building a strong, sustainable infrastructure, and for developing NCME as an association that provides leadership in its field both internally to the organization and externally to a broader stakeholder audience.

The Strategic Business Plan provides a roadmap for the future of NCME. Incorporated into the plan are elements that set the baseline for understanding the current status of the association, projected future vision, affirmed mission, and tangible three-year goals that set the stage for NCME’s future growth and recognition.

SECTION 2: SITUATION ANALYSIS

Background

In the past ten (10) years, fulfillment of NCME’s mission to advance the science and practice of measurement in education has centered around four primary services to members:

1. Support of Scholarship to Advance the Field

2. Organizational Improvement
3. Outreach to Organizations and Individuals
4. Recruitment and Professional Development

In addition, NCME identified a number of activities and/or responsibilities to support its primary goals:

- ❖ to advance the science and practice of measurement through the services it provides its members.
- ❖ to provide services to its members that are responsive to member needs and address the constantly changing demands of the practice of measurement in education.
- ❖ to organize NCME's leadership so it can respond to the needs of members in a flexible and timely way.
- ❖ to actively seek mutually beneficial relationships with groups of practitioners and other professional organizations that have as their goal increased understanding of practical measurement issues while promoting good assessment practices in education.
- ❖ to take an active role in informing legislators and policymakers on proposed legislation, regulations, and policies that affect measurement practice in education.
- ❖ to help recruit promising students into training programs and provide professional development opportunities for its members to maintain and improve their professional competence.

The plan established in 1997, while clear in the types of activities that NCME was undertaking at the time to achieve its goals, a schedule for future activities was lacking.

The planning session in November, 2006 was designed to re-establish a clear Vision, supporting Mission, and 3-year goals. Primary issues identified by NCME's leadership were:

- Growing and Diversifying Membership
- Taking a more pro-active leadership role in educational assessment and training
- Becoming national leaders to influence public policy pertaining to educational assessment.

Strategic Opportunity

NCME is well-positioned to provide value-added benefits to its members through clarification and promotion of its role as the leading association in educational measurement. Its strong history of professional development and ongoing role as a leader in establishing best practices and standards for educational assessment and training provides excellent opportunities for growth and future impact.

Among the opportunities are:

- To set high standards for and endorse measurement practices.
- To provide for broad representation of the measurement community.
- To proactively engage in the formation of public policy.
- To provide a broad forum for scholarly work and professional development.

Key to NCME's future growth will be clarity around the role of the board in setting the future direction and goals of NCME, development of a shared vision among the stakeholders, and a blueprint for how to achieve the vision.

SECTION 3: CURRENT POSITION

- A. Purpose and Value*
- B. Market Placement*
- C. Organizational Profile*
- D. Financial Status*

A. Purpose and Value

Current purpose and value are perceived positively by NCME's leadership, especially as relates to current stakeholders. In particular, three primary areas of current value were identified as:

- resource for the exchange of ideas, knowledge and information.
- professional development and interaction
- publications and national conference

Information exchange and professional development are of particular value to members as noted by leadership. However, there is a desire by NCME to strengthen its purpose and value among its stakeholders by more aggressively establishing itself as a recognized national leader and resource for educational measurement. Future value will also be achieved by NCME more effectively representing the community to those outside the community and having more influence over the formation of public policy.

B. Market Placement

NCME is one of several organizations around the country that is concerned with educational measurement. NCME has collegial relationships with several of these, including the American Educational Research Association, Association of Test Publishers (ATP) and the National Association of Test Directors. NCME is also a sponsoring organization and has representatives serving on two joint committees that oversee testing standards and practices (Joint Committee on Standards for Educational Evaluation; Joint Committee on Testing Practices).

NCME is not a member of the American National Standards Institute (ANSI), which represents a large cross-section of stakeholders, primarily with a business focus. The purpose of ANSI is to coordinate the development and use of voluntary consensus standards in the US, and represent the needs and views of US stakeholders in standardization forums around the globe.

Currently NCME does not engage in proactive policy formation or discussions with legislators (either state or federal); its focus has been internal to its members and immediate stakeholders.

The primary issues related to strengthening market placement are:

- Growing, diversifying membership
- Removing constraints of volunteer leadership (time, resources)
- Building a national/recognized ‘voice’ to influence public policy
- Increasing the number of people in the field overall
- Broadening NCME’s focus and successfully addressing internal resistance to change

C. Organizational Profile

NCME is organized as a 501c6 association under the rules of the IRS. NCME is managed via Fernley & Fernley, which provides management and operational services to NCME and its members.

Governance/Membership

NCME currently has a Board of Directors consisting of nine (9) board members that includes the President, the Vice President (President Elect), and the Immediate Past President. The board must include at least six other persons elected by mailed ballots of the Active and Emeritus members.

There are seventeen (17) committees composed of board members and volunteers from the membership.

Levels of membership are:

- (a) *Active* membership is defined as a person actively engaged in the field of educational and psychological measurement, who desires to promote the purpose of NCME, and who pays dues as prescribed by the bylaws. This category of membership confers the privileges of voting and holding elective office.
- (b) *Associate* membership is defined as any person, institution, or organization interested in promoting the purpose of NCME and paying dues as prescribed in the bylaws. An Associate member shall not have the right to vote or hold elective office.)
- (c) *Emeritus* membership is defined as any person who has been an active member of NCME for at least 10 years, is at least 60 years of age, is no longer employed on a full-time basis, and who pays dues as prescribed by the bylaws. This category of membership confers the privileges of voting and holding elective office.
- (d) *Student* membership is defined as any graduate student in the field of education and psychological measurement who is endorsed by an active or emeritus member, who is interested in promoting the purposes of NCME, who is not employed full-time, and who pays dues as prescribed by the bylaws. This category of membership for any one individual is limited to four years. This category of membership can neither vote nor hold elective office.

NCME’s membership has decreased since June 2003, from 1992 members to 1677 in 2006, with fewer new members and a growing level of Emeritus members. The majority of NCME’s

members come from the college/university setting or the testing industry.

In a survey completed by NCME leadership they noted concerns about the decreasing membership numbers. Noted in particular was a desire for a more diverse membership (ethnic, gender) which they also recognize may be difficult to attain based on the demographics of current participants in the measurement field, which reflects the composition of the current community of educational measurement specialists. The measurement community will need to broaden its reach to improve diversity. Also noted was the desire for broader representation of users in organizations at different levels and in different industry areas (school systems, state agencies, federal agencies, R&D organizations).

These will be critical factors for NCME's future growth and overall impact.

Management/Staff

As noted, NCME is managed via a management contract with Fernley & Fernley; Joe Casey, CAE is the association's Executive Director.

Future activities may obligate NCME's leadership to seek additional resources for administration and oversight to build additional internal capacity.

D. Financial Status

NCME currently has a stable financial base for its organizational needs, which are focused primarily on holding an annual meeting and publishing two periodicals.

Membership Dues, the Annual Meeting, and the association's publications have provided the bulk of the income for operations, which through 2006 has been sufficient to underwrite the contractual agreements for association management.

REVENUE AND SUPPORT		
Budget Category	% of budget/ 2004	% of budget/ 2005
	\$324,248	\$399,338
Member Dues	24%	24%
Conference Registrations	30%	26%
Journal Subscriptions	41%	41%
Other	5%	8%

EXPENSES		
Budget Category	% of budget/ 2004	% of budget/ 2005
	\$302,703	\$300,085
Contractual Services	44%	45%
General & Admin	7%	6%
Governance	4%	8%
Publications	29%	23.%
Annual Meeting	14%	16%
Membership	1%	1%
Other	1%	1%

In constructing the business plan to achieve NCME's future vision and goals, it will be important for leadership to carefully consider the resources required to achieve the projected goals as well as where revenue will be generated to provide for those resources.

SECTION 4: FUTURE POSITION

- A. Vision, Mission (Purpose)**
- B. Infrastructure (Organizational Profile)**
- C. Market Placement (Internal Impact)**
- D. Market Placement (External Impact)**

A. Vision, Mission (Purpose)

FUTURE VISION:

Identified were five (5) broad areas of desired achievement over a ten-year horizon:

- Have a voice/influence in public policy and industry standards
- A broader stakeholder audience
- Be a recognized source of expertise in educational measurement
- Provides a broad, accessible forum for resources
- Provides members with opportunities for professional development and a strong professional identity

WORKING MISSION (purpose) STATEMENT:

To advance the science and practice of measurement in education.

Purpose Statements:

1. Set high standards for measurement practice.
2. Provide for broad representation of the measurement community.
3. Proactively engage in the formation of public policy.
4. Provide a broad forum for scholarly work and professional development.

B. Infrastructure (Organizational Position)

GOAL: Build the infrastructure and financial capacity of NCME to accomplish its vision, mission and goals

Strategic Intent:

To increase the operating and financial capacity of the association so that NCME can enhance its national recognition and the professional identity of its members.

Strategic Assumptions

- There must be adequate money, resources, and capacity to underwrite future growth.
- Leadership must break organizational inertia, resistance to change.
- NCME can and must be entrepreneurial.
- There is an existing lack of knowledge, experience and membership resources for growth.
- NCME's governance structure must become more effective and efficient (e.g., too many committees strain resources, decrease efficiencies of decision-making).
- There is internal resistance to change.

Primary Strategies

- Develop a governance plan to ensure sustainable association leadership.
- Develop 3-year budget projections and financial models to fund operations and a sustainable infrastructure.

- Develop management systems and infrastructure aligned with planned (future) growth of membership and membership services.

INFRASTRUCTURE: ORGANIZATIONAL POSITION

<i>Strategies</i>	<i>CURRENT Tactics</i>	<i>FUTURE Tactics</i>	<i>Projected Outcomes</i>
Continue to develop a governance plan to ensure sustainable association leadership.	Review and revise as necessary board governing documents that lead board recruitment efforts (roles & responsibilities, nominations guidelines, leadership profile, etc.) Review and revise bylaws to allow for future growth	Seat an ad hoc committee to review the association's governance structure and make recommendations for change. Develop a "Leadership Growth Plan" utilizing board governing documents to cultivate, select, and mentor new leadership on the board to take over chair, vice chair and other important roles that can lead the board in their meetings and deliberations, and will lead NCME based on future vision and planning goals. Implement the Leadership Growth Plan Engage in annual board self-assessment Engage in an annual board retreat	Engaged, diverse, representative board of directors. Effective, efficient committees whose work results in timely board decisions Knowledgeable, informed board members. Effective communication with membership resulting in a "pipeline" of potential board members and future board leadership
Develop 3-year budget projections and continue to develop financial models to adequately fund future operations and infrastructure based on sustainable growth and a sustainable infrastructure.		Based on the 3-year strategic plan, identify staffing and other resource needs . Create a 3-year Financial Plan incorporating funding models and potential alternative sources of revenue that will capitalize on the strategic plan Obtain board approval of the Financial Plan Create and use methods for closely tracking budget and financial projections, including cash flow projection models and financial dashboards.	Financial growth and sustainability. Logical addition of staff and other organizational resources as needed.
Continue to develop management systems and infrastructure aligned with planned (future) growth of membership and membership services.		Implement the Financial Plan Develop job descriptions for current and potential future staff positions Worked with TRG to provide additional staff resources as necessary and/or hire external consultants Develop information technology systems as appropriate to track membership plans for education, communication and leadership development	Streamlined systems and effective association management

C. Market Placement: Internal Impact

Goal : To be recognized as an industry expert within the Measurement Community
(note: internal to the measurement community)

Strategic Intent:

To increase NCME’s influence within the measurement community, and enhance the value of membership in NCME.

Strategic Assumptions

- There is a general lack of understanding of PR/marketing.
- There needs to be adequate resources and capacity.
- The value of the measurement profession need to be developed and promoted.
- Stratification/indicators that demonstrate qualifications will be important to develop.
- NCME’s main role is to provide quality information and instruction.
- Clarifying/identifying career paths for measurement community will be important to NCME’s future.
- NCME’s future success will rely on
 - Meeting the needs of practitioners/ measurement professionals;
 - Demographics – driven by understanding of potential career paths; segmentation of market: match output/offerings to needs
 - Defining broader skill needs
 - Marketing the organization and focusing on the solicitation of new members from both inside educational institutions and outside of educational institutions.
- There will be some internal resistance to change.
- Members will be required to take a more active role.

Primary Strategies

- Increase NCME’s level of national recognition.
- Broaden NCME’s stakeholder base.
- Increase NCME’s professional development programming.
- Establish NCME as a primary resource for measurement education and training information.
- Improve the capacity of school districts to meet state and federal testing mandates.

Market Placement: Internal Impact

<i>Strategies</i>	<i>CURRENT Tactics</i>	<i>FUTURE Tactics</i>	<i>Projected Outcomes</i>
Increase NCME National Recognition		Develop a comprehensive marketing/communications plan to promote NCME and its work in the measurement community first (e.g., NEA, AFT, NASSP, NAESP, and ultimately to the general public. (identify target groups, craft message, determine budget and timing, establish role for NCME membership to promote NCME) Conduct focus groups with primary and other stakeholders to test NCME recognition/image in the measurement community	Strong and visible professional identity Increased responsiveness to needs of multiple constituent groups A lead organization for setting, and promoting standards and practices

		<p>Communicate with members/other stakeholders about NCME plans for national & international promotion to ensure ownership and support</p> <p>Implement a comprehensive marketing/communications plan to promote NCME and its work in the measurement community and to the general public.</p> <p>Identify organizations with similar/crossover, complementary missions, ideals for potential relationships</p> <p>Establish formal relationships with the identified organizations Develop a 3-year membership promotion plan that segments markets, identifies various market needs and opportunities, and promotes opportunities in multiple industries (including addressing institutional support of the organization)</p> <p>Implement a 3-year membership promotion plan that segments markets, identifies various market needs and opportunities, and promotes job opportunities in multiple industries (including addressing institutional support of the organization)</p> <p>Establish an NCME internship program that helps place interested students with NCME partners/stakeholders to result in the recruitment of new people into the measurement industry.</p>	<p>Increased responsiveness to needs of multiple constituent groups</p> <p>Increased institutional memberships</p> <p>Increased membership levels, including a more diverse representation (practitioners vs. workers)</p>
<p>Broaden NCME's stakeholder base</p>			
<p>Continue to develop NCME Professional Development Programming</p>	<p>Develop instructional modules for non-measurement professionals (teachers, principals, etc.) related to increasing professional literacy (useable in an 'instructor-free' environment)</p>	<p>Expand NCME's training and professional development program for measurement education professionals</p> <p>Continue to Implement a national training and professional development program for measurement education professionals</p> <p>Develop an NCME "Fellow" or "Scholar" program (need clarification if this is conferring an honor or establishing a true fellow program versus a membership category)</p> <p>Implement instructional modules for non-</p>	<p>Nationally established , accepted professional development curriculum and training program that can be adapted per institution or measurement organization</p>

<p>Establish NCME as A primary resource for measurement education and training information</p>	<p>measurement professionals (teachers, principals, etc.) related to increasing professional literacy (useable in an 'instructor-free' environment)</p> <p>Be a lead participant in developing the plan (timetable, participants) for review and delivery of national and international measurement Standards</p>	<p>Leader in setting industry standards in assessment practice and research.</p>
	<p>Be a lead participant in promoting the plan (timetable, participants) for review and delivery of national and international measurement Standards</p> <p>Develop a plan to establish NCME as a primary repository/clearinghouse for information on educational measurement</p>	<p>National expert and resource for sound, appropriate practices for measurement</p> <p>Measurement, assessment materials readily available to practitioners, stakeholders</p>
<p>Improve the capacity of school districts to meet state and federal testing mandates</p>	<p>Implement the plan to establish NCME as the repository/clearinghouse for information on educational measurement</p> <p>Establish the baseline capacity for school districts to meet state testing mandates</p> <p>Develop and test feasibility of a plan for providing information and techniques for improving school district capacity to meet state testing mandates</p> <p>Implement the plan</p> <p>Create, implement an evaluation tool to review, test progress</p>	<p>Increased request for materials.</p> <p>Incorporation of materials in school planning.</p> <p>Increase assessment literacy.</p>

D. Market Placement: External Impact

Goal : Position NCME as a leader influencing public policy pertaining to educational measurement.

Strategic Intent

To ensure sound, ethical measurement practices.

Strategic Assumptions

- There is potential to lose members should NCME take public policy positions.
- NCME will need to build “real” connections to other organizations in the industry, which are currently lacking.
- There will need to be an incentive/purpose to engage with NCME.
- There is an existing lack of knowledge/expertise about how to impact national conversation.
- NCME will require additional resources (staff, financial) to achieve this goal.
- This work will require members to take a more active role.

Primary Strategies

- Establish NCME as a primary source for measurement information and Standards for groups that influence public policy.
- Establish a prominent, proactive public position on current measurement issues.

Market Placement: External Impact

Strategies

**CURRENT
Tactics**

**FUTURE
Tactics**

Projected Outcomes

Establish NCME as the primary source for measurement information and advice for groups influencing public policy

Develop and implement website promotion

Measurable influence on national policy

Identify a current committee or designate a new Advisory Group in the development of the Clearinghouse mechanism.

General public, other education-related organizations, policy groups recognize NCME as the primary resource on measurement issues

Identify external organizations (public policy, advocacy) that would benefit from access to information and standards on measurement in education.

Develop information that is user-friendly to public policy groups (translate research into data and information that is useful to the general public)

Develop the clearinghouse mechanism to provide access to or distribution of relevant information for interested groups

Implement the clearinghouse mechanism to provide access to or distribution of relevant information for interested groups

Establish a prominent, proactive public position on current measurement issues

Develop plan to establish capacity needs, policies and procedures for building NCME expertise in identifying, reviewing and commenting on public policy issues. Includes:

Determining mechanism for how public policy issues are undertaken/ addressed by NCME

NCME is the primary institution invited to testify on measurement issues.

Annual public comment and/or position on measurement issues that influence policy and legislation.

Identifying and inviting additional professional networks (national and international) to comment on public policy issues through NCME

Policy reflects sound practice

Establishing a process for providing public comment on a minimum of two issues per year

Issuing a minimum of two white papers per year to inform audiences/stakeholders on current education measurement practices as they relate to policy issues

Testifying in Congress at least once a year on measurement related policy or legislation

Board discussion/approval of Government Relations component and implementation plan
(predicated on the assumption that NCME will be pro-active in offering its services and advice as opposed to reactive in responding to groups or legislators seeking information)

Stakeholder/member approval of Government Relations component and implementation plan

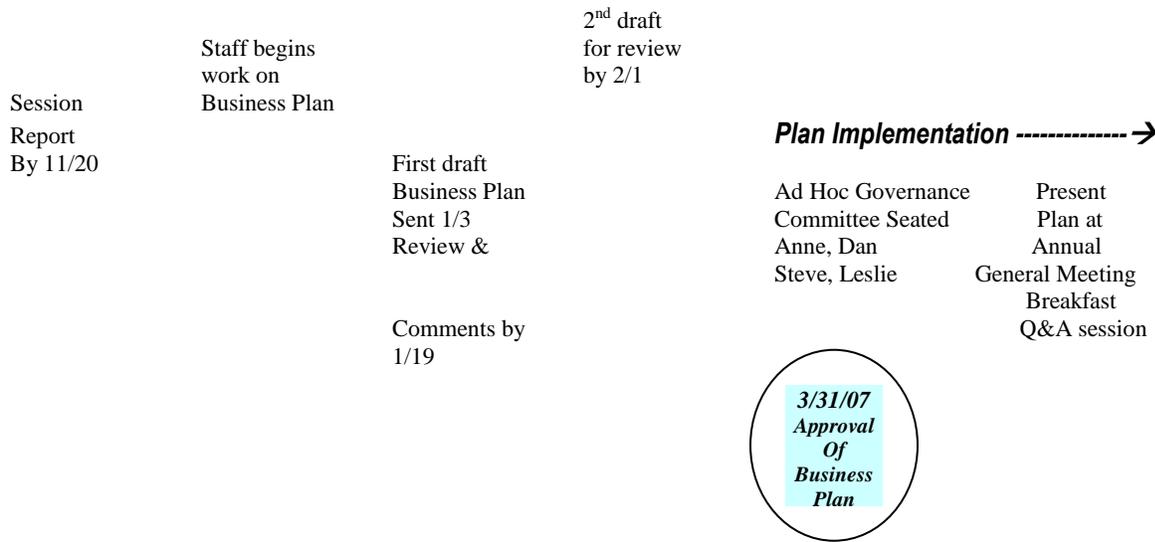
Implementation of Government Relations plan

SECTION 5: WORKPLAN AND TIMELINE

A. *Short Term: November 2006 to April 2007*

ONGOING WORK ----->
Integration and Exit Strategies

ONGOING COMMUNICATION to Members/Stakeholders regarding Plan, Process, Outcomes----->



Nov. 2006	Dec 2006	Jan 2007	Feb 2007	March 2007	April 2007
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B. *3 Year (2007 – 2009) Workplan and Timeline Attached*

