



NECHE's new accreditation management solution has supported the organization in maintaining the highest quality of work at increased volumes, streamlining constituent experiences, and contributing to institutional member success.

We developed NECHE's accreditation management system for higher education that supports quality assurance and continuous improvement for its 200+ member institutions.



The New England Commission of Higher Education (NECHE) is an institutional accreditor recognized by the United States Department of Education (USDE). The organization, established in 1885, is a voluntary, peer-based, non-governmental membership association which promotes educational excellence and quality assurance for its over 200 member institutions.

The organization attracts a dedicated team. "I love what I do," shared Laura Gambino, vice president of NECHE. "I get to work with an incredibly talented, smart, and dedicated group of colleagues every day. And I get to work with folks from 200-plus institutions across the region, across the country and across the globe, and help them both assure the quality of student learning and focus on continuous improvement. So I feel incredibly privileged and humbled to get to help them in their work."

"Success for us is success for our members," Gambino said. "If our institutions are able to go through the processes of accreditation smoothly and in a way that contributes to the dual purposes of accreditation, quality assurance and continuous improvement, that's success for us."



Across my career, I've done a lot of software deployments and implementations, so I've worked with a lot of vendors. And I was always impressed by the thoroughness and the responsiveness of Sara's team. All of them had clearly done their homework before they came in. They knew our policies and procedures unbelievably well. Our whole team was very impressed with how well they understood our processes and—this is something that I'm always cognizant of—they worked to create a system that supported our processes. They didn't try to adjust our processes to fit their system.



— **Laura M. Gambino,**
Vice President, NECHE



100% system adoption



10 team members handling more volume with less effort



200+ member institutions supported

NECHE'S GOALS

When NECHE first came to us, the organization was using a legacy internal database, some paper-based processes like mailing, and many manual processes. For those who weren't familiar with the old database, finding what they needed could be a challenge.

Leadership decided to transition to a Salesforce system for multiple reasons. The team wanted to automate processes, create efficiencies, and reduce redundancy of effort. In addition, staff hoped to more easily communicate with their external constituents: evaluators, institutions, and commissioners.

Institutions are up for reaccreditation every ten years and need to submit a high volume of documentation to NECHE. Preparing data for each cycle takes an institution up to two years. NECHE is responsible for managing all of the data and documentation that institutions send, along with managing numerous processes related to evaluation and accreditation.

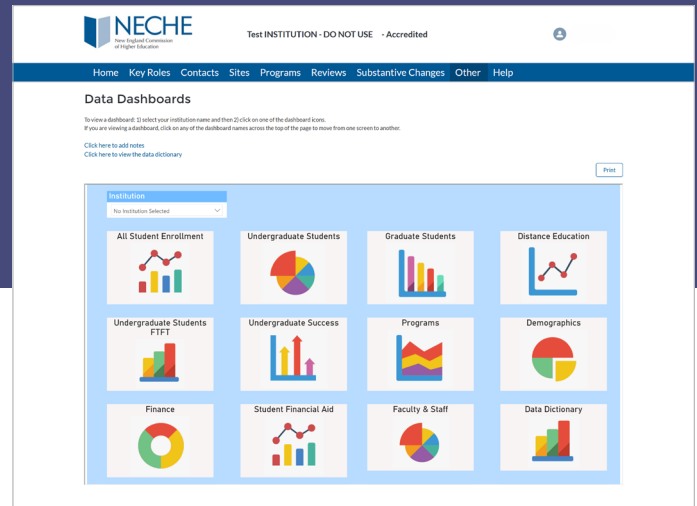
WHAT WE BUILT

Our team met with the NECHE team to learn more about their work. These meetings—called “discovery” sessions—helped us to understand numerous intertwined processes and to factor in the needs of all users and roles. We incorporated this knowledge into our development of an enterprise-level accreditation management solution on the Salesforce platform.

We implemented the system in a phased rollout, first to their staff, and then to each constituent group to support effective adoption. NECHE now uses the system across all of their accreditation work.

Key features of the system are as follows:

- All staff-access to manage accreditation work, including documentation, institutional progress tracking, reports, and communications
- Stakeholder portals on Salesforce Experience Cloud with 24/7 availability:
- Institution portal: Access to forms, document submissions, contact updates, visit scheduling, and instructions, all broken down into bite-sized action steps, as well as dashboards of student achievement and financial data
- Volunteer evaluator portal: Ability to securely review and submit materials, view team reports and meeting schedules, and update conflict of interest and skill information
- Commissioner portal: Commissioners can view hundreds of pages of evaluation materials and view institution trends in dashboards, and staff can more easily organize commission meetings and simplify other behind-the-scenes work
- Power BI integration to aggregate and visualize demographic, spending, graduation, and view institution trends in dashboards, and staff can more easily organize commission meetings
- Apsona document generation integration for auto-creating institution history sheets, financial screens, invoices, annual reports, emails, agendas, action letters, and other key forms



NECHE's Data Dashboards provide institutions with easy-to-digest data metrics and visualization.

The accreditation management system we built for NECHE has helped the entire staff, evaluators, commissioners, and institutions track and manage all aspects of the accreditation process.

Before, staff had to send copies of information to many different constituents, track numerous updates, and watch for conflicts of interest. Their new system of portals in Salesforce Experience Cloud means that time spent sharing information is greatly reduced and staff can spend more time engaging with stakeholders, monitoring institutions, and performing other critical work. Conflicts of interest are also auto-flagged and removed by the system. ***“We only have one copy of everything now, which is so much easier to manage,” Gambino said.***

Institutions previously had no way to directly interact with or contribute data to NECHE's system. They would need to mail or email all documents and updates to staff. With their new system, they can submit all information and documents, including accreditation reports, annual reports, financial screens, and drafts for review through the portal. Forms are streamlined using a third-party integration with FormAssembly.

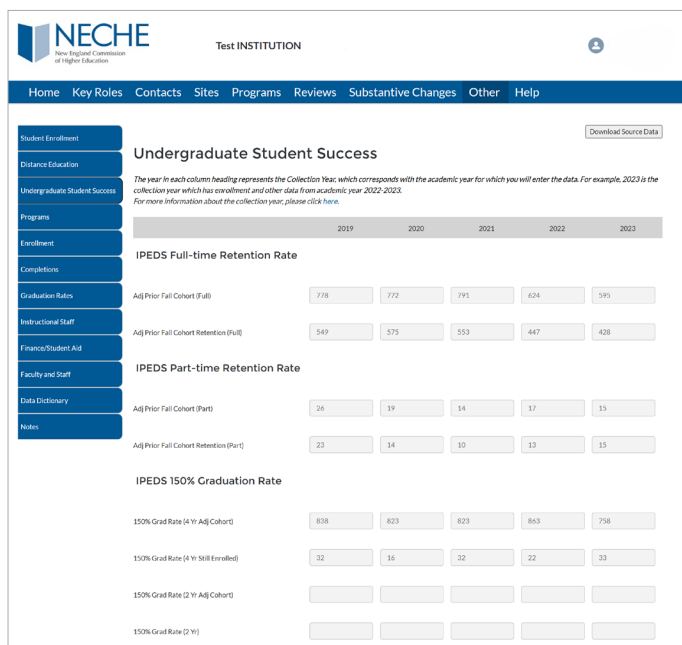
Institutions can also access important information related to their accreditation visits, such as scheduling details and team member contact information, at any time. As well, they can explore 11 dynamic dashboards—using the third-party product Power BI—with visualizations of enrollment, student success, and some financial information about the institution, using imported Integrated Postsecondary Education Data System (IPEDS) data from the National Center for Education Statistics. The data that NECHE is now able to provide to stakeholders is richer and higher quality than before.

Evaluators used to receive all materials in the mail and send updates via email. Now, they can access the review they are assigned to by logging into their evaluator portal. *“The second an institution uploads its self-study, the evaluator gets notified that the self-study is available for download,” Gambino said. “It’s much more secure, private, and instantaneous.”* Team chairs can also submit team reports via the portal. All evaluators can update their profiles at any time with conflicts of interest, expertise, and areas where they work, ensuring eligibility is current for assignment to teams.

Prior to the Salesforce system we built, NECHE used a system to share materials with commissioners on iPads, which required a lot of digitizing of documents. Now, everything is saved in one place in their commissioner portal. Commissioners have access to all materials for any commission meeting. They will see reviews and upload their reviewer form, then come up with a plan for commission action. Conflicts of interest are automatically flagged and access to those materials is removed by the system. They can also see high-level Power BI dashboards of institutional data.

NECHE’s staff members had been manually creating and updating numerous types of documents. Their new system features document generation with the third-party product Apsona that can speed up creation using templates and auto-population of data from the system to make finished PDFs. The most critical documents they can now generate quickly are institution history sheets, which are formal records of every accreditation action taken by the commission, and financial screens that provide institutions and the commission snapshots of institutions’ financial health. Other highlights include detailed invoices, annual reports, agendas, emails, and action letters.

“Every staff member is using the system every day, pretty much all the time,” Gambino noted. “It touches on just about every aspect of our work.”



Dashboard where institutions provide data year-over-year on various enrollment and success measures.

IMPACT ON THEIR WORK

IMMEDIATE ACCESS TO ACCREDITATION DATA AND PROCESSES FOR ALL PARTIES

NECHE has received glowing feedback from institutions, evaluators, and commissioners on the portals. Institutions love being able to immediately access materials and upload documents at their convenience on any device. Staff no longer have to worry about mailing copies of materials to evaluators. Evaluators find the experience easier and more streamlined. Commissioners and staff appreciate having the full breadth of relevant institutional data at their fingertips.

“Everybody loves it,” Gambino said. “It’s been incredibly gratifying. I will give kudos to the development team for helping to develop a set of portals that are just easy to use and find your way through. The response has been very, very positive.”

Gambino attributes success to the phased rollout and the work of our team to understand her team’s needs and prepare for training. *“The team worked really hard to understand what our requirements were, to work through the design, to make sure that the look and feel was what we wanted, and to help us make sure it was all set up,”* she said. *“They helped us prepare so we could train and work with our institutions and evaluators in getting to know the system. And they’re so responsive any time we have a question. I think they were key to having that successful rollout and that positive response from all of those different constituent groups.”*

ABILITY TO HANDLE HIGHER VOLUME WITH SAME STAFF

While the system we built for NECHE has saved them significant time in manual processes, it doesn’t mean that NECHE’s staff no longer have anything to do! In fact, the workload at NECHE has increased in the last four years due to a change in the institutional landscape. More institutions have had financial challenges, and the amount of engagement with institutions and the commission has increased. Agenda items and number of proposals have also increased, as well as the number of institutions that NECHE monitors more closely.

The system has allowed NECHE to manage this increased volume with the same number of staff members by eliminating duplication of efforts and streamlining many of their accreditation processes. *“The fact that we do what we do with 10 staff speaks to how well the system is working for us,” Gambino said.*

FASTER AND EASIER COMMUNICATIONS

NECHE has heard feedback that institutions are getting the information they need faster. Staff are able to focus on other tasks that they previously weren’t able to devote as much time to, like deeper engagement. They can also access data to answer constituent questions much more quickly. *“To be able to work directly with our institutions more is what we all want to be doing,” Gambino noted. “So the system has freed us up to do that.”*

STREAMLINED LOGISTICAL PROCESSES

Staff at NECHE appreciate how much easier some of their day-to-day accreditation work has become. From the quick building of a commission meeting and the ease of adding a review to it, to inline editing, to running a good report, the system helps them do what’s needed faster and with less effort.

ORGANIZATIONAL TRANSFORMATION

Gambino considers NECHE’s 100% adoption of the new system to be a big win for the organization. Staff members now look for ways to optimize their processes within the system and share best practices. *“It really has transformed the way our organization functions,” Gambino said. “And that’s been a great thing to see and be a part of.”*