



**2022 – 2025 Strategic Plan
-As Adopted-**

**Developed March 2022
Approved September 2022**

Mission:

Advance and elevate the professional practice of investor relations.

Vision:

NIRI aims to be the leader in providing indispensable education, networking and support for the investor relations (IR) community that results in management and the investment community valuing IR professionals as essential partners in providing long-term stakeholder value.

NIRI is a growing community that supports networking and advancement of the interests of IR professionals.

Core Values:

- **Community.** Collaborative community to advance learning and knowledge sharing.
- **Integrity.** Operate with integrity and trust.
- **Inclusion.** Welcome and include a broad and diverse community.
- **Thought Leadership.** Impact the changing environment through advocacy and education.

Goals:

1. Expand NIRI's membership by growing reach and market relevance.
2. Champion investor relations and IR professionals as essential partners to the C-Suite.
3. Use innovative ways to increase and enhance community engagement.
4. Strengthen NIRI's long-term financial health and ensure operational excellence.

Goal 1: Expand NIRI's membership by growing reach and market relevance.

Accelerators:

1. Address the unique knowledge needs of IR professionals and those adjacent to the field.
2. Broaden programming and knowledge resources to meet the needs of members and the changing environment.
3. Cultivate a pipeline to engage and support new members and those just entering the field or adjacent fields.
4. Support chapters and expand ways for members to engage in other, non-geographic ways.

Goal 2: Champion investor relations and IR professionals as essential partners to the C-Suite.

Accelerators:

1. Grow awareness within the business community about the critical role that investor relations plays in corporate valuation and strategy.
2. Generate thought leadership and provide foresight on emerging topics relevant to public companies.
3. Engage in and influence the legislative and regulatory process.
4. Seek opportunities to increase the visibility of investor relations with a broad spectrum of partners.

Goal 3: Use innovative ways to increase and enhance community engagement.

Accelerators

1. Utilize technology to increase knowledge sharing, collaboration, career advancement, and professional growth.
2. Understand and address the critical job-related challenges and needs of members (by career stage and other segments).
3. Conduct research to gather input from community members and identify emerging areas of interest.
4. Create education and awareness of career pathways for professionals.
5. Create and expand opportunities for members from diverse backgrounds and experiences to connect, educate, inform, and influence the future of NIRI and the profession.

Goal 4: Strengthen NIRI's long-term financial health and ensure operational excellence.

Accelerators:

1. Align NIRI's business model to encourage greater engagement from both members and nonmembers and the next generation of professionals.
2. Add, upgrade or sunset programs to ensure NIRI remains relevant and drives revenue growth.
3. Optimize technology to meet the diverse needs of multiple stakeholders.
4. Strategic investment while maintaining a disciplined cost structure.
5. Continuously review Enterprise Risk Management and ensure proper mitigation actions are in place.