



INTERNATIONAL STATISTICAL INSTITUTE

ISI Strategy 2017 to 2021

May 2017

ISI Executive Committee 2015-2017

ISI STRATEGY 2017 TO 2021

In a world where data is being produced in greater volumes and variety, resulting in a wide range of data sources from a wider range of players, anyone working with data and in statistics has to know what can be trusted and what should not. The ISI strives to remain relevant in a changing world.

This new strategy has been developed by the ISI Executive, working together with Council. It builds on a survey of the membership undertaken in February 2016, which identified our strengths, weaknesses, opportunities and challenges. Strengths of the ISI include:

- the diverse range of statistical disciplines we cover, the network we have developed between them and our international reach, which means we truly represent statistics;
- our tradition, independence, knowledge and experience, which translates into improved statistical practice;
- our recognition of outstanding professional contributions through elected membership and awards, which celebrates excellence in statistical practice, research and teaching;
- the WSC and other conferences, which provide a platform recognised as unrivalled in our field.

The value of the ISI membership as seen by our members include:

- helping the world to be a better place by working to improve statistical practice and capacity around the globe;
- having an opportunity to network and participate in an international community of statisticians.

The strategy has the following components:

1. A mission statement and set of objectives
Which describe what we do and what our role is;
2. A vision
Which sets out the direction in which we want to go;
3. A set of values
Which drive our behaviour;
4. A set of strategic priorities
Which describe the main goals we want to achieve.

Its purpose is to set out a long-term vision and goals for the organisation, which will help guide our priorities and activities over the next four years. It will:

- Give focus, clarity and direction – providing a framework against which competing priorities can be decided;
- Enable more pro-active, less reactive planning and action;
- Energise members and staff, giving them a clear sense of purpose;
- Communicate the progress and activities of the organisation;
- Provide understanding on the long-term direction – through the discussion process that leads to its establishment;
- Establish metrics for evaluating progress towards goals.

The strategy will be supplemented each year by an operational plan, which will set out the activities to be undertaken in that year, to advance the strategy.

THE ISI MISSION

The ISI Mission is to lead, support and promote the understanding, development and good practice of statistics worldwide, by providing the core global network for statistics.

ISI OBJECTIVES

The ISI Objectives are:

1. To lead, support and promote the international statistical community;
2. To stimulate and disseminate research, best practice and advancement in statistical science and statistics education;
3. To speak up for the profession on topical statistical issues;
4. To advocate and foster statistical literacy, the use of statistics and data in decision making by governments, businesses and individuals;
5. To grow the statistical community in developing countries and help it to be more inclusive;
6. To promote an understanding of statistics as a force for improving people's lives;
7. To advance the development of young statisticians and to encourage the continuing participation of older members;
8. To promote and develop networking between members;
9. To function effectively and within its budget.

ISI IN ACTION

The ISI will pursue its mission and objectives through various lines of action indicated below, as well as others developed to advance our strategy.

1. Collaborating and developing partnerships with national and international statistical bodies and with other organisations to develop a worldwide voice for statistics through policy statements and strategic initiatives on a range of statistical issues, including professional ethics and statistical literacy.
2. Organising World Statistics Congresses, Regional Statistics Conferences, satellite meetings and short courses.
3. Promoting and delivering capacity building workshops and activities that serve the needs of the community, especially from developing countries.

4. Supporting our membership:
 - a. Through a website that communicates with members of the ISI family and highlights their activities;
 - b. By awarding prizes for outstanding statistical contributions;
 - c. By obtaining funding to facilitate travel for young statisticians and statisticians from developing countries to conferences and workshops;
 - d. By supporting and collaborating with international, national and regional statistical societies;
 - e. By providing networks through outreach committees, special interest groups and regional networks;
 - f. By facilitating collaboration through virtual meetings using modern technology;
 - g. By reporting examples of successful influence, intervention and interaction with politicians and the media to promote our values;
 - h. By maintaining a comprehensive listing of statistical conferences and events, and a glossary of statistical terms.
5. Publishing our journals: International Statistical Review and Stat.
- 6 Supporting and working with the ISI Associations.

THE ISI VISION

It is our vision to increase our influence as the leading professional organization and core network for statistics worldwide linking government, academia, business and society.

This vision is reflected in our catchphrase: “Statistical science for a better world”.

THE ISI VALUES

We recognise that we work across the world, where values and cultures differ. We will promote tolerance, harmony and respect for differing cultures within the worldwide statistical community.

Our shared professional values are described in the ISI Declaration on Profession Ethics. They are respect, professionalism, truthfulness and integrity.

1. Respect

We respect the privacy of others and the promises of confidentiality given to them.

We respect the communities where data is collected and guard against harm coming to them by misuse of the results.

We should not suppress or improperly detract from the work of others.

2. Professionalism

The value Professionalism implies Responsibility, Competence and Expert Knowledge, and Informed Judgment.

We work to understand our users’ needs.

We use our statistical knowledge, data, and analyses for the Common Good to serve the society.

We strive to collect and analyse data of the highest quality possible.

We are responsible for the fitness of data and of methods for the purpose at hand.

We discuss issues objectively and strive to contribute to the resolution of problems.

We obey the law and work to change laws we believe impede good statistical practice.

We are continuously learning both about our own field, as well as those to which we apply our methods.

We develop new methods as appropriate.

We do not take assignments in which we have a clear conflict of interest.

We act responsibly with our employers.

3. Truthfulness and Integrity

By Truthfulness and Integrity, we mean Independence, Objectivity and Transparency.

We produce statistical results using our science and are not influenced by pressure from politicians or funders.

We are transparent about the statistical methodologies used and make these methodologies public.

We strive to produce results that reflect the observed phenomena in an impartial manner.

We present data and analyses honestly and openly.

We are accountable for our actions.

We have respect for intellectual property.

As scientists, we pursue promising new ideas and discard those demonstrated to be invalid.

We work towards the logical coherence and empirical adequacy of our data and conclusions.

We value well-established objective criteria of assessment.

STRATEGIC PRIORITIES

Following the feedback from the members' survey and discussions with Council we have identified four priorities for the next five years. We need to recognise that with the limited resources we have – both financial and our own time – we cannot do all we would like to do, and we need to prioritise new undertakings on what is most important. Focusing on these priorities will enable us to tackle several immediate issues that we have identified. The strategic priorities will provide a framework for the ISI's work in the coming years, determining what we spend our time and resources on. We begin to define the goals we want to achieve, which we will monitor to show the progress towards our vision. The priorities are listed below, one per section.

1. Encourage statistical communication and networking

Providing facilities for networking and encouraging communications between members and with other statistical communities and greater use of blogs and social media will be key to attracting more members and engaging them with the work of the ISI. This will enable ISI to be more effective, and especially help us towards our objectives of leading, supporting and promoting the statistical community; disseminating research and best practice; growing the statistical community in developing countries; advancing the development of younger statisticians and encouraging the continuing participation of older members. Our main tools for this will be the following.

a. The World Statistics Congress.

The ISI World Statistics Congresses are the flagship events of the ISI, characterised by a rich scientific programme and a unique social and cultural programme. WSCs are highly valued by our membership, but more emphasis needs to be placed on their networking potential with more modern technology including improved web sites, conference apps and video streaming.

Our flagship conference will have its communications potential enhanced, with networking seen as a key aspect of these biennial meetings. We will use the WSC as an opportunity to engage the membership in the work of the ISI. We will improve our web site's functionality and develop/adopt a conference app to meet the needs of modern conference participants while investigating selective video streaming for non-attendees.

b. Workshops, satellite events and short courses, attached to the WSC

c. Regional Statistics Conferences and corresponding satellite events, short courses, workshops, etc.

d. Making more active use of web blogs and social media.

e. Video and audio conference facilities for ISI and Association working groups.

Our goal is to demonstrate substantially increased engagement and networking among our members as measured by an annual membership survey [Specific measure to be defined once the initial survey has been completed].

2. Increase the public voice of statistics

A number of our members feel that the ISI could adopt a higher public profile on statistical issues, including:

- The image of statistics and the place of the profession;
- Promoting best practice in statistics;
- Data science and data analytics and the collaboration with computer science;

- Being a champion for the public value of good statistical information and analysis, including on topical and challenging issues;
- Promoting the value of Open Data
- Defending statistical integrity and ethical standards
- Being particularly active with politicians and the media;
- Debating the use and misuse of statistics.

This has also been added as new objective (3). Some national statistical societies have a good record of public advocacy for statistics. Often, they are supported by paid staff for this purpose. They produce regular reports on relevant statistical policy issues; respond to government consultations; are represented on national forums and run regular events, including training for parliamentarians and the media. However, these societies have paid staff allocated to this work, and have a national government with which they can work. ISI needs to work internationally, and use its membership to take this forward.

A more effective public voice will demonstrate the relevance of ISI to its mission. ISI will:

1. Explore possible ways and structures to meet the scientific challenges of data science and data analytics through collaborative efforts within ISI and the Associations, and with other societies;
2. Take on an even more active role at the UN Statistical Commission, being more abreast of the agenda and submitting papers (written by member groups) on topics that are up for discussion or that the Commission is consulting on;
3. Identify the issues that we want to develop. There would be consultation on these with the membership;
4. Set up members' groups to look at the issues and produce draft position statements – possibly for discussion at a business session at the WSC;
5. Identify key media contacts across the world and develop a facility to respond quickly to issues by identifying possible spokespeople among our membership;
6. Use Regional Statistics Conferences as a means of developing national capacities for this work.
7. Provide materials that members can use in their countries

Our goal is for members to recognise that the ISI has contributed to raising the public voice of statistics, as measured by an annual membership survey [Specific measure to be defined once the initial survey has been completed].

3. Develop statistical capacity

The ISI has been actively helping to build statistical capacity in developing countries. The 2013 White Paper on statistical capacity building (SCB) defines our objectives as: enabling statistical practitioners in the public and private sectors to use state-of-the-art methods for data collection, analysis and interpretation; and contributing to the development of statistical infrastructure and human resources in official, survey, and business statistics as well as in statistical education and research.

To accelerate our efforts in developing countries, in 2013 the ISI launched the Committee on Statistical Capacity Building. Its role is to advise the ISI Executive Committee on the planning, development and implementation of appropriate initiatives. The Committee is composed of the co-chairs and representatives from developing regions where the ISI

expects to develop capacity building projects, the representatives from the ISI EC and the Council, and from major statistical societies, such as the ASA, the RSS etc.

Our SCB objectives as stated above are very broad and can be seen to cover many of the ISI's overall objectives. More focus is needed to clarify our priorities and capabilities, to define the role of the SCB committee more specifically, and to define our strategic contribution among the other SCB players. ISI and its Associations should work more closely together and provide good coordination, cooperation and communication with other SCB providers.

Statistical capacity building is covered by most of ISI's objectives.

ISI will:

1. Set up a task force to define what we do well, what kind of capacity are we building, who are our target recipients, what capacity we have to do this, what our priorities are, how we work with the associations, which partners will we work with (including national statistical societies), how it is to be delivered, how it can be maintained, how quality can be maintained, how SCB is to be organised and managed (the role of the SCB committee), and how can we get feedback and measure the impact;
2. Establish the Task Force to bring forward a plan by July 2018. Our goal is to have a transparent plan for Statistical Capacity Building, with clear priorities and objectives, together with regular reports of successful projects completed, with good feedback from developing countries.

The ISI SCB Committee will continue its work once the Task Force has delivered its report by July 2018.

4. Secure our financial sustainability

Our finances are not currently sustainable. Most of our income that goes towards supporting our professional staff is spent on administrative tasks such as collecting membership fees, membership recruitment and administration, maintaining the website, newsletter, supporting attendance at meetings, supporting the national organisers of WSCs and RSCs, and managing our finances. There is no regular income surplus available to progress strategic initiatives.

The main problems include revenue shortfalls associated with: decreasing membership; a WSC that generates little income, and the Associations not fully reimbursing the central costs of supporting their members.

This priority is recognised as objective 7.

These issues will be addressed, as follows.

a. Expanding, developing and engaging our membership base

ISI has been successful in recruiting new Regular Members, but the same increase is not evident in Elected Members. Our Elected membership is ageing, is too Euro/North America centric and is not sufficiently diverse – by gender or by ethnicity, reflecting its origins. Not enough of our membership is engaged in supporting ISI initiatives. Making good progress

towards our vision will require an expanded and more active membership. We also need to develop our membership to take on responsibilities within ISI and nurture its future leaders.

Work has already been done to identify what ISI has to offer statisticians, which is: contributing to human development by improving statistical practice and capacity worldwide; and providing opportunities for statisticians to connect and network as part of an international community. ISI now needs to develop initiatives to attract a larger and more active membership.

The new strategy with its clarity about the benefits of ISI membership provides a platform for the attraction of new members. We will do this by:

- Expanding our elected membership;
- Targeting the areas where our membership is low.

We will improve the retention of existing members.

(Engaging the membership is covered by strategic priority 1).

b. Developing a new financial model for WSCs

The ISI World Statistics Congresses are highly valued by our membership, but are expensive (on average 1.5 million euros) and burdensome to organise, with most of the expenses and responsibilities borne by the national organisers.

Unlike other conferences, WSCs do not generate a surplus, and they place a large burden on their hosts who are not necessarily experienced conference organisers on this scale. It is becoming difficult to find hosts. A new financial model is needed. Options for developing the WSCs could include:

- A model (or more than one) that is more flexible than the NSO/government commitment model;
- Increasing the registration fees and/or reducing costs;
- Longer term international sponsorship agreements managed by the ISI PO;
- Strengthen the support function at the ISI PO for the WSCs (funded from WSC income);
- Attracting more exhibitors;
- More partnerships with our corporate members and with regional and national societies.

Any option considered will take account of the key international and developmental roles of the WSCs.

ISI will:

1. Set up a task force to complete this analysis and to develop models for WSCs;
2. Work on a cost model on the assumption that a WSC would take place in The Netherlands, to assist the EC in its analysis.

c. Resolving the complex financial arrangements with associations

The concept of the Associations was established by ISI in 1948, although the first Association was not set up until 1973. There are currently seven Associations, which are

established by the General Assembly to promote the mission and objectives of the ISI in particular areas of statistical interest. Associations have their own Statutes and By-laws, governance, membership schemes, publications and contracts with publishers, budgets and spending priorities, conferences and other activities, and their own websites.

At the same time, ISI and Associations have common links through the Council, through participation in the shaping of the WSC programme, and by sharing the services and support of the Permanent Office, including membership and financial administration, newsletters and social media, etc.

The current arrangements are complex, making them difficult for members to understand and expensive to administer. The management fee paid by some associations to ISI does not cover the costs of administering their membership. The value of the financial benefits extended to Association members, such as reduced registration fees for the WSCs, far outweighs the costs, creating loss of revenue for the ISI. The legal basis for Associations is weak under Dutch law: only ISI itself is a registered society in The Netherlands and has full legal authority.

Possible options to resolve this include:

- A restructured individual membership scheme so that anyone who joins an Association as a member also becomes an ISI member;
- A simplified fees structure for ISI and Associations which is sustainable for the future, whilst remaining attractive for current and potential new members;
- A redesigned model for organizational membership of the ISI and Associations, streamlining the benefits and the fees structure, with clear arrangements for income sharing;
- As a result of the joint ISI + Associations membership, all members would enjoy the same benefits (free publications, reduced rates, etc.);
- A redesigned model for administration fees charged to the Associations for central services.

If the current separate membership arrangements are retained, the following are needed:

- Review and simplify the membership fee structure, whilst retaining the autonomy of separate Associations;
- Review the charges made to Associations for membership management and general administration, to ensure that these are in line with real costs incurred and sustainable;
- If necessary, advise how the legal position of each Association could be strengthened;
- Negotiate formal agreements that ensure fair and equitable treatment of benefits concessions, so that ISI can have a say whenever decisions are taken by Associations that affect ISI's revenues.

The ISI will:

1. Discuss the options available with all the Associations and with Council;
2. Bring forward proposals to the General Assembly.

Our goals are to have:

1. A steadily increasing membership bringing us increased income, and retaining a higher percentage of our existing membership [metrics to be determined]

2. WSCs that bring income to ISI and to hosts, making them a financially attractive conference to host.
3. A simplified relationship with associations, with clearer fee structures so that associations are not a financial burden to the ISI.
4. A sustainable budget for ISI that meets its administrative costs and enables it to progress its strategic priorities.