



**FALL BOARD MEETING**  
**SATURDAY, SEPTEMBER 30, 2017**  
**ATLANTA, GA**

Board Book available on [Board Page](#)

Continental Breakfast available at 8:00, Meeting begins at 8:30

Rooms 406/407

Buffet Lunch 12:00 p.m.

Bowling, food and fun at [Painted Pin](#) @ 7:00 p.m. Meet in lobby @ 6:30

**AGENDA**

**Welcome**

**President's Report** (40 mins.) (8:30 – 9:10)

*Vicky Carlson*

- Overview of agenda
- President Travel
- Review of August Officer call
- Review Friday Officer Meeting
- Approval of [7/8](#) and [7/13/17](#) Board meeting minutes (Action item)
- [NCSC's Annual Conference Post-Conference Report](#)
- [NACM/IACA Wrap Up](#)
- [NACM/MSU MOU](#) (Action item)

**President Elect's Report** (10 mins.) (9:10 – 9:20)

*Paul DeLosh*

- [CDC](#)

**Vice President Report** (10 mins.) (9:20- 9:30)

*Will Simmons*

- [Finance](#)
- [State Associations](#)

**Secretary/Treasurer's Report** (45 mins.) (9:30 – 10:15)

*TJ BeMent*

- [YTD 2017 Budget](#)
- [2018 SJI grant](#)
- [Proposed 2018 Budget](#) (Action item)
- [Potential Revenue Options and/or Expense Reductions for 2018](#) (Action item)

**Break** (15 min) (10:15 – 10:30)

**Communications Committee** (60 mins.) (10:30 – 11:30)

*Dawn Palermo*

- [2018 Advertising Rates](#) (Action item)
- Placement for electronic CM – Members only or Public (Action item)
- [Review CM proposal](#)
- Printed Court Manager 2018 – What's included? (Action item)
- [Determine 2018 Guide Topic](#) (Action item)
- [2018 Webinar Topic](#) (Action Item)
- [Website Redesign Proposal](#) (Action Item)

**Governance Committee** (30 mins.) (11:30 – 12:00)

*Greg Lambard*

- [Committee Objectives](#)

**Lunch** (12:00 – 1:00)

**Membership Committee** (30 mins.) (1:00 – 1:30)

*Jeff Chapple*

- [Change E-member to First Time Member](#) (Action item)
- [Offer non-NACM COSCA members a 2018 Membership](#) (Action item)
- [Dual Membership Agreements](#) (Action item)

**Immediate Past President** (15 mins.) (1:30 – 1:45)

*Scott Griffith*

- Exit Interviews
- JTC/CITOC MOU (Action item)

**Core Committee** (10 mins.) (1:45 – 1:55)

*Kathy Griffin*

- New web page proposal (Action item)

**NCSC Update** (1:55 – 2:10)

*Jesse Rutledge*

- General update

*Jennifer Haire*

**Break** (2:10 – 2:30)

**Strategic Planning overview** (2:30 – 3:30)

*Vicky*

**Executive Session** (3:30 – 4:00)

*Board*

- [NACM/NCSC MOU](#) (Action item)
- Other

**ADJOURN @ 4:00 P.M.**

**Sunday, October 1**

Breakfast @ 8:00 a.m. Meeting 8:30 – 12:00 Rooms 406/407

**Strategic Planning**

*Vicky/TJ/All*



## **Board Meeting Minutes**

**July 8, 2017**

In attendance: Scott Griffith, Vicky Carlson, Yolanda Lewis, Paul DeLosh, Stephanie Hess, Jeff Chapple, Alfred Degrafinreid, Julie Dybas, Kathy Griffin, Greg Lambard, Alyce Roberts, Jeffrey Tsunekawa, Jesse Rutledge, Jennifer Haire, Janet Reid, and Patti Tobias.

Absent: T.J. BeMent, Kevin Burke, and Dawn Palermo

President Scott Griffith called the meeting to order.

### **President's Report – Scott Griffith**

1. Officers Meeting: Officers met and discussed the National Center Memorandum of Understanding proposal, strategic planning with committees – board activities including review of committee structure to reflect priorities ex: education committee, partnerships (who we want to be partners and why), JTC collaborations, update from Mary
2. Minutes from June Board Call – asked for objections.
  - a. There being none, considered approved

### **Governance Committee Report – Greg Lambard**

1. Resolutions Communication Strategy – change #3 and #4 from can to may suggest.
  - a. Send resolutions to education committee to see if can be made into guide/education session
  - b. Suggestion to be proactive vs. reactive on resolutions
2. Operations Manual Revisions
  - a. Suggestion made to approve entire package.
  - b. Motion to approve edits.
  - c. Paul has updated site selection process to add after cleaned up version out and available.
  - d. Yolanda – Open door policy on page 155 needs to be removed, Article 5.
  - e. Question: if every time there is a revision needs to be voted on. Scott: governance committee will still need to work on this. Vote today is general clean up.

- f. Reference document in Ops manual but not actual document so updated items are linked.
  - g. Jeff suggests changes made be voted on and continue revisions as necessary. Pull out webinar guide, open door policy, change can's to may's
  - h. Scott motioned, Yolanda seconded.
    - i. All in favor, suggested changes accepted, none opposed.
- 3. Page 192 of board book – Strategic Planning Report Form.
  - a. Presented format and requests board approval. Strategic plan develops annual priorities to include focus on budget. Time is an issue in doing this. Board likes the look.
  - b. Vicky suggests post on website so members can see.
  - c. Scott asked for a motion to accept.
  - d. Kathy made motion, Alyce seconded.
    - i. All in favor, none opposed and report was accepted.

#### **Vice President/Finance Committee's Report – Yolanda Lewis**

- 1. Audit Committee – Yolanda discussed the document which outlines the structure of the Audit Committee, responsibilities and voluntary process. Requested any recommendations for change. Last audit 2016, audit takes place 2020 for 2019 year.
- 2. Yolanda suggests this be an appendix to ops manual.
- 3. Stephanie questions whether committee should be created in conjunction with the audit and then dissolved.
  - a. Discussion as to what type of committee this would be considered: decision to make it a special committee.
  - b. Yolanda will update to reflect is a special committee.
- 4. With changes, Vicky made motion to approve, Stephanie seconded.
  - a. All in favor, none opposed.

#### **Secretary/Treasurer's Report – Paul DeLosh**

- 1. Budget Update
  - a. Financial Reports are now stored on the NACM Board page of Connected Community. All board members have access and are encouraged to review.
  - b. Paul gave overview of budget – projections for revenue and expenses. Midyear Revenue projections above of tracking.
  - c. Costs and expenses have been analyzed. May have larger deficit than anticipated. Items to watch include conference expenses and revenue and publications



- d. Investment Account – money market, investment and operating.  
\$50,000 previously committed to update of the website
  - e. Board will need to review investments accounts due to website expenditures and to address possible deficit. It is important for the board to protect organization moving forward.
2. Site Selection
- a. Paul presented site selection report for MY and Annual 2019. Two year out planning has been a challenge, need to plan further out.
  - b. Criteria for site: members in a state, dual membership, state association, history of success in the state. Use two tier site selection matrix: Tier 1 (25 or more members), Tier 2 (24 members or less). Reach out to states, identify whether there would be commitment from state associations/members. 4 regions considered, required to rotate throughout those. Have been on east coast for annual last 4 years, felt needed to go to Region 1 for Annual Conference.
  - c. Initial search: selected 4 locations, only 1 possible. Added two cities. Little Rock and Nashville only availability.
  - d. Annual Selection: 4 sites, only Las Vegas had availability. Added Phoenix.
  - e. Went to site visits: recommends Little Rock (Marriott) for Midyear, Annual for Las Vegas (Hard Rock)
  - f. Took into consideration location, what to do, and whether there was room to expand.
  - g. Marty Sullivan believes he can get 125 people from Arkansas to attend Midyear.
  - h. Kathy made a motion to approve Marriott, Little Rock, AR. Greg seconded.
    - i. All in favor, none opposed.
    - ii. 2019 MidYear will be in Little Rock.
  - i. Stephanie made a motion to approve Hard Rock, Las Vegas, NV. Vicky seconded.
    - i. All in favor, none opposed.
  - j. Starting process to engage in 2020 now.

### **Communications Committee Report – Alyce Roberts**

- 1. Court Express is going out August 24, articles due August 7.
- 2. Court Manager published. The subcommittee has been working on transitioning to an electronic publication. Proposal emailed out this morning.
  - a. National Center sought proposals from 4 publishers for electronic version. One did not do design work, so did not receive details. Received proposals from Mellen Street Creative, Registered Creative and Color

Outside. Recommend Mellen Street Creative: known quantity, quote lower. Met requirements for search and ad overlays/spots. Past 5 year issues would be in flipbook and searchable.

- b. Redesign Mellen Street Creatives' mock up for a fresher look.
  - c. Subcommittee recommends Mellen Street Creative. Alyce made a motion, Vicky seconded.
  - d. Paul questioned cost. Total investment is \$12,200 for ezine.
  - e. All in favor, none opposed.
3. Webinar Topic Selection
- a. LGBTQ and Emergency Preparedness webinars were very successful. Alyce feels like this is important and should continue. Ideas for fourth webinars: Joint Technology Guide, Plain Language in Courts and Domestic Violence Guide.
  - b. Ties into education initiative – how used and overlap – are sessions in conference and webinar building on each other.
  - c. 3rd Webinar on Court Administrator Guide will be in September. Will be building on what is covered at conference. Market as such. Don't want to push out same information in different ways.
  - d. Alyce recommends Plain Language webinar as 4th webinar. Vicky suggests switching topics.
  - e. Jeff makes motion that the other webinar is the Importance of Plain Language, Yolanda seconded.
    - i. All in favor, none opposed.
4. Jeffrey gave a report re: website analysis. 9% response to surveys. Consultant received a lot of helpful information. Evaluated website based on industry standards. Great information on site, lacking on ability for people to find information. Consultant had 3 recommendations:
- a. Address design and layout. Nowhere close to industry standards currently. Create more white space, add top tool bar, change member login,
  - b. Content. Develop messaging and positioning based on target audience. Areas to drive specific people to. Content Management System recommended.
  - c. Navigation and Usability. Site as a spiderweb, no common thread.
  - d. Know site needs to move forward with web design. What does that mean? Do worry about brand creep? Who is managing these things?
  - e. Want financial commitment from board. Cannot move forward with requests for proposal. Thinking cost may be \$35-50K, content management another \$50K.
  - f. Paul: Initial Commitment from Board of \$50,000
  - g. Vicky: Need to get proposals and evaluate

- h. Motion to move forward with an RFP for the boards consideration with a website made by Alice. Second by Vicky.
- i. All moved in favor, none opposed.

### **President-Elect/Conference Development Committee's Report – Vicky Carlson**

1. Vicky thanked everyone for the support on this conference – Patti, Janet and Team, Val
2. Association Leadership Conference – 17 signed up. Ask board members to stop by. Meeting from 1-4. 2:30 pm there will be a facilitated discussion.
3. Midyear 2018, no change in the structure. Recommends same rates as Portland in 2017: early bird \$475, ECP \$425.
  - a. Yolanda motioned that rates would be kept at the 2017 rates, Vicky 2nds.
    - i. All in favor, none opposed.
4. Hosts and Reporters – question value. Vicky would like to propose eliminating reporters and reporter summaries. Stephanie 2nd.
  - a. Stephanie motioned, Yolanda seconded.
    - i. All approved.
5. Conference Length Proposal – presented document in board book. Two full days of programming at Midyear, start Monday, end Tuesday afternoon. Alyce seconded.
  - a. Vicky amended motion to see if it would work for Little Rock, and if couldn't move it to 2020. Jeff seconded.
  - b. All in favor, none opposed. The motion carries.
6. Vicky would like to make a motion to go back to repeat sessions as an option for the 2018 midyear and developing criteria around that. Kathy seconded.
  - a. All in favor, none opposed, motion carries.
7. Use rejected proposals for conference as idea for webinars.
8. Annual Conference proposal: shorted annual conference, lessen registration. Start Sunday and end on Wednesday.
9. Add question to the evaluation about conference length.

### **Core Committee Report – Kathy Griffin**

1. Rollout 1 competency at each conference. Don't want to cram too much into. Greg discussed micro sessions (30 minutes) at conferences.
2. Kathy wants feedback re: toolkits and self/group assessments. Feels like always asking same authors.

### **Immediate Past President's Report – Stephanie Hess**

1. All in favor to pass board position description, none opposed.

2. No historian for NACM. Past president have documents. Next immediate past president decides do you want a policy and what it intends. Scott states drafting policy, he will do that moving forward.
  - a. Kathy motioned that Scott develop a policy in his role as Immediate Past President. Stephanie seconded.
    - i. All in favor, none opposed.

## **INVITED GUESTS JOIN**

Welcomed invited guests. Asked everyone to introduce themselves.

## **NCSC Report— Mary McQueen**

1. Gave update from the National Center. Shared re: major projects. National Task Force on Fines & Fees.

Each invited guest gave 2-3 minutes as to what is going on with their organization.

**Kevin Bowling** – His service on Global is done end of the year next year. Board will need to make another appointment.

## **Membership Committee's Report – Jeff Chapple**

1. Addressed every strategic item this year. LinkedIn – August focus on Court Administrator September Court Manager. Ken Kalman is going to work with communications.
2. Working with registered creative re: Onboarding for members. Are working on packet with schedule with mentor, committee, data up to date, social media, renewal messaging. Will have plan for fall board meeting.
3. Revised Membership Brochure – add registered trademark with the ®
4. Offered 7 scholarships this way. Plan to exceed \$2,000 raised for scholarships this year.
5. Discussion around fun run dollars going to scholarships.
  - a. Motion made to table discussion for now 2018 to move fun run registration fees less expenses to scholarship by Vicky.
6. Discussed 2018 Strategic priorities membership levels.

## **New Business**

1. Vicky: Gave board statistics regarding decline of attendance at the annual conference. Will table for now, but will raise question in fall.
2. Scott recognized Greg & Jeffrey on behalf of service this year. Vicky acknowledged Alyce, and Yolanda acknowledged Alyce as well.

Directors moved into Executive Session.



## **Board Meeting Minutes**

**July 13, 2017**

In attendance: Vicky Carlson, Paul DeLosh, Will Simmons, Scott Griffith, Jeff Chapple, Sarah Couture, Alfred Degrafinreid, Julie Dybas, Kathy Griffin, Greg Lambard, Rick Pierce, Alyce Roberts, Jeffrey Tsunekawa, Jennifer Haire, Janet Reid, and Patti Tobias.

Absent: T.J. BeMent, Dawn Palermo

President Vicky Carlson opened the meeting and welcomed everyone.

### **NCSC Report— Jennifer Haire**

1. Jennifer Haire discussed the relationship with the National Center for State Courts. National Center has a contract with NACM to provide association services. As the contract is set to expire at the end of this year, ongoing effort continue to finalize the Scope of Services. Such services include assistance with exhibitors and sponsorship, conference management, accounting services, and routine support from NACM's Association Services Manager. The long-term relationship has been positive with Vicky noting the great work of the Center

### **Annual Conference DeBrief – All**

1. Concern about Mogeong Mogeong – attendee walking out due to leniency on crimes against women. Not politicize speakers.
2. Back to back plenaries were a lot; needed a brief break.
3. Yolanda had difficulty announcing awards; people talking over speaker.
  - a. Although people were distracting could hear announcement.
4. Vendor exhibit space worked well – Maximized use of their time.
5. A few vendors expressed interest in going back to give-away cards.
6. ECP reception was great. Card idea went over well. ECP'ers want to do more
  - a. First-time attendees: had to explain how to get involved. (Would be worth sending Thank You email).
  - b. Reserved table to ECP/Scavenger hunt?
  - c. Renee Danser to write article about getting involved.
  - d. Online activity feed with mentor/mentee options.
  - e. Patti – Involve ECP'ers in speaking.
  - f. It was noticed that many ECP folks were alone during the conference and perhaps something could be done to address.

7. Committee meetings at Conferences – not many new members at meetings.
  - a. Need to look at marketing for greater attendance
  - b. Look at when we schedule meetings.
  - c. -Committee Fair – at booth learn about committees.
  - d. Call for Volunteers email – sent twice a year.
8. Make sure breakout speakers stay on time.
  - a. Need to concentrate on Host duties and need to stay during entire session.
9. Sunday valuable.
  - a. Don't think we should have sessions Sunday.
  - b. Keep Sunday travel/dress down day – casual.
10. Committee meetings at Midyear?
  - a. Have not done in the past, but only have 200 people – Perhaps worth trying.
11. People value networking opportunities in the evening.
  - a. Perhaps do one of each. (one happy hour and another the evening networking suite)

#### **Board Resource Guide Overview – Vicky Carlson**

1. Updated each year. Content includes travel, details of board page, how to get on connected community, etc.
  - a. New board members have been added to connected community.
  - b. New board members provided NACM email address.
  - c. Contact sheets were distributed for board members to add their contact information.

#### **Conference Call Schedule – Vicky Carlson**

1. Schedule distributed
  - a. First call August 3 for new members.
  - b. Vicky will send out monthly communication
2. No Sunday board meetings at Midyear or Annual Conference, but will meet on Sunday at the Fall board meeting

#### **Committee Assignments – Vicky Carlson**

1. Permanent and Standing Committees:
  - a. Conference Development: Paul DeLosh, Chair and Will Simmons, Vice Chair
  - b. Membership Services: Jeff Chapple, Chair; Jeffrey Tsunekawa, vice chair
  - c. Governance: Greg Lambard; Alfred Degrafinreid, Vice Chair

- d. Communications: Dawn Palermo, Chair; Jeffrey Tsunekawa, Website vice chair; Kathy Griffin, Social Media vice chair; Alyce Roberts, Publications vice chair. Other slight changes forthcoming
- e. Core: Kathy Griffin, Chair
- 2. Want new board members to be acclimated.
- 3. Committee and board health. Find committee to really stay involved in/stay comfortable in. Not expected to be on every committee call. Officers will assign themselves to committee so one officer is on every committee.
- 4. Mentors – new board members used to have mentors. Instead of assigning mentor, new directors pick their mentor

Update board bio – send updates to Janet or let know it is fine. Headshots will be sent to board members for review. **Carry Over/Old business – Scott Griffith**

- 1. Main things carrying over: Agreement from the National Center.
- 2. Encourages all to look at strategic plan. Fundamental reference for committee.
- 3. Looking at who our partners are. Strategic look at the list, will be working on.
- 4. Streamline who at board meeting – who are the partners should be pursuing. Don't need so many people at the board meeting. Possibly submit report. Also, look at Dual Membership. Jeff will look at this.
- 5. Transfer of files to new chairs.

#### **Conflict of Interest Policy – Paul DeLosh**

- 1. All board members sign each year. Form signed and returned to Paul.

#### **Upcoming Meeting Dates – Vicky Carlson**

##### **1. Fall Board Meeting, Atlanta, GA**

Officers: Friday, September 29, 2017

Board: Saturday and Sunday, September 30 – October 1, 2017

##### **2. Midyear Conference, February 11-13, 2018 – Orange County, CA**

Officers: Friday, February 9, 2018

Board: Saturday, February 10, 2018

##### **3. Annual Conference, July 21-26 2018 – Atlanta, GA**

Pre-Conference -

Officers: Friday, July 20, 2018

Board: Saturday, July 21, 2018

Post-Conference -

Board: July 26, 2018

- a. Vicky will contact people to talk about committees.
- b. Alfred will not attend fall board meeting.

**Adjourn – Vicky Carlson**





**ANNUAL CONFERENCE**  
JULY 9-13, 2017

IN PARTNERSHIP WITH



**EXCELLENCE ON A  
GLOBAL SCALE**



**NACM Annual Conference 2017**

**Post Conference Report**

Compiled by Valerie F. Gardner



# National Association for Court Management

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## NCSC Recommendations and Observations

### Audio Visual

1. NACM exceeded the projected Audio Visual budget by just over \$4,000. This is due to a variety of factors: 1. the addition of Sunday afternoon breakouts, 2. the increased size of some breakout space led to a need for two screens (and additional costs), 3. numerous panel presentations during plenary and breakout sessions (which require additional microphones.) These costs can be better monitored by reducing the number of people on panels (or number of panels), keeping all panels in the same room, and/or not having Sunday breakouts.

### Education

1. Evaluations showed a mixture of comments including "great sessions" and "not enough time to address the topic." It may be worth considering a track that provides longer sessions or considering part 1 and part 2 sessions for those topics that may warrant additional time to be covered sufficiently. There are several comments which refer to more substantive sessions vs. sessions for people "new" to court administration - perhaps a "part 2" session would also address this.
2. As with Midyear, we experienced some breakout rooms that were overflowing while others were almost empty. Because the conference was at maximum capacity, planners had maxed out the space ahead of time by changing classroom set-up to theater, and swapping out/combining rooms for greater capacity. To combat this the following options are available: 1. send an email requesting session preferences ahead of time to determine room assignment for the most popular rooms, 2. cut off registration at a lower limit to provide ample breakout space. 3. add larger breakout space during contract negotiations which might have a cost impact to the organization and is not recommended (this would also limit the number of hotels able to host.) Space is currently assigned based on history, so NACM should consider this moving forward.

### Onsite Management

1. Having the lunch buffet for 700 people, prior to the business meetings caused long lines, difficulty finding seats and finding which room to go to. NCSC staff recommends considering a sit-down lunch to expedite the process with a preset salad and dessert (this would cut down on interruption during the business meeting portion.)
2. The NACM charity drive is always a success, so having a NACM member or committee member at or near the area to encourage donations is key. Having NACM board or other members near the area during peak hours is recommended. Having signage or other means to encourage donations is also recommended. NCSC recommends an assigned board or committee member be responsible for the items as well as the placement of the area each morning and taking it down each evening.
3. Board members were a great help in making two events run smoothly at this conference: 1. Moving conference attendees on the buses and to the Library of Congress. Because of the volume of attendees, board members helped to minimize confusion and direct people where they needed to go. NCSC Staff will continue to provide detailed information for special events to board members in the future so that they are informed and able to answer most questions they may receive from conference attendees. 2. Increased visibility to exhibit booths during the exhibit show. Exhibitors had expressed this as a concern at Midyear and the board was very gracious in thanking exhibitors for their investment and attendance at Annual.

### **Exhibit Show**

1. The prize card seemed to come back up in conversations, and some missed not having it. There could be some other options, especially using the mobile app, to create new exciting ways to incorporate synergy between exhibitors and attendees by having attendees have certain tasks, for example: go to 5 booths and take a selfie with an exhibitor and post on NACM website; to get extra bonus points, and at the end of the exhibit show, prizes can be awarded to attendees with most points.
2. Schedule and space availability permitting, NCSC recommends having an "opening social hour" in the exhibit hall. This creates much more of a buzz in the hall and allows attendees a sneak peak at the exhibit hall for the next day. Some exhibitors were confused with the hall closing for an hour then re-opening, so it may be beneficial to leave the hall open instead of closing.
3. NCSC recommends creating a "sponsor education track" – company pays a set amount to speak as one of the concurrent breakout sessions. Session is advertised as a "sponsored session" and there are other session options at same time for attendees as well. Some exhibitors have key speakers who are very good. NACM would not have to pay for the speakers, therefore saving money and potentially boosting sponsorship revenue.

### **Suppliers**

1. NCSC recommends adding the lead retrieval option on the Mobile App. It would be a valuable investment that exhibitors would use and appreciate. It would be seen as a value add in the exhibit fees that some exhibitors continue to comment are high.

### **Miscellaneous**

1. The conference app has the ability to receive ratings and feedback on sessions, many people chose to provide their feedback through attendify. 727 responses were received from attendify (not to include the social activity.) While the feedback on attendify is more limited than the email evaluations, it is recommended that NACM choose one to promote for feedback. If the app is used to this end, it is suggested that a general survey be emailed out at the end of the conference for more specific questions. Having one way to provide conference feedback would eliminate confusion.

## EVENT ANALYSIS AND REPORTS

Savings and Contributions

Food & Beverage Summary

Social Event Summary

Audio Visual & Miscellaneous

Hotel Gratuities

Hotel & Registration Pace Report

Registration History

Educational Counts & Scores

General Survey Results

GCS Savings

Exhibit Sponsor Revenue

Sponsorship Summary

## SAVINGS AND CONTRIBUTION SUMMARY

### APPLIES ONLY TO THE WESTIN CONVENTION CENTER HOTEL

Guestroom Management	\$24,396.32
Additional Concessions	\$2,840.00
<b>Total</b>	<b>\$27,236.32</b>

#### Guestroom Management

CATEGORY	Quantity Rooms	@	Rack Rate	Discounted Rate	=	Savings	x	Room Nights	Total Savings
<b>Hotel</b>									
Two Bedroom Presidential Suite	1	@	\$ 678.37	\$ -	=	\$ 678.37	x	8	\$ 5,426.94
Ambassador Suite	6	@	\$ 226.50	\$ 198.19	=	\$ 28.31	x	8	\$ 1,359.00
Deluxe King	15	@	\$ 215.18	\$ 198.19	=	\$ 16.99	x	8	\$ 2,038.50
Discounted staff rooms	10	@	\$ 198.19	\$ 130.24	=	\$ 67.95	x	6	\$ 4,077.00
1/45 comp room nights	58	@	\$ 198.19		=		x	0	\$ 11,494.88
<b>TOTAL GUESTROOM SAVINGS</b>									<b>\$ 24,396.32</b>

#### Additional Facility Concessions and Complimentary Items

CATEGORY	Regular Price	Quantity	x	Discounted Price	=	Savings
Comp Wireless Internet Office	\$ 150.00	2	x	\$ 150.00	=	\$1,050.00
Comp room amenities	\$ 58.00	10	x	\$ 58.00	=	\$580.00
Comp Airport Transfer	\$ 110.00	5	x	\$ 110.00	=	\$550.00
Comp Parking Passes	\$ 22.00	3	x	\$ 22.00	=	\$660.00
<b>TOTAL CONCESSIONS</b>						<b>\$2,840.00</b>

No Charge for Early Departures

In-Room WiFi complimentary, No charge for Fitness Center

<b>Friday, July 7</b>							<b>Daily Total</b>	<b>\$216.51</b>
Item Description	QTY	Actual	Price	Discount Price	Net	Grat 24%	6% Tax	Gross
<b>Officers Meeting</b>								
Coffee Break			\$216.51		\$0.00	\$0.00	\$0.00	\$216.51
Lunch (Off Property)								
							<b>Event Total</b>	<b>\$216.51</b>
<b>Saturday, July 8</b>							<b>Daily Total</b>	<b>\$972.26</b>
Item Description	QTY	Actual	Price	Discount Price	Net	Grat 22%	10% Tax	Gross
<b>Board Meeting</b>								
Breakfast Buffet	25	18	\$36.00	\$32.40	\$583.20	\$139.97	\$72.32	\$795.48
Buffet Lunch	25	18	\$44.00	\$39.60	\$712.80	\$171.07	\$88.39	\$972.26
							<b>Event Total</b>	<b>\$972.26</b>
<b>Sunday, July 9</b>							<b>Daily Total</b>	<b>\$46,173.79</b>
Item Description	QTY	Actual	Price		Net	Grat 24%	6% Tax	Gross
<b>Leadership Seminar</b>								
Coffee Service	5	2	\$82.00	\$82.00	\$164.00	\$39.36	\$12.20	\$215.56
Assorted Soft Drinks by consumption	40	0	\$5.00	\$4.50	\$0.00	\$0.00	\$0.00	\$0.00
							<b>Event Total</b>	<b>\$215.56</b>
<b>ECP Reception</b>								
Drink Ticket	175	60	\$8.00		\$418.85	\$100.52	\$31.16	\$550.54
Bartender Fee	1		\$150.00	\$138.18	\$138.18	\$0.00	\$0.00	\$138.18
<b>First Time Reception</b>								
Drink Ticket	175	111	\$8.00		\$841.85	\$202.04	\$62.63	\$1,106.53
							<b>Event Total</b>	<b>\$1,795.24</b>
<b>President's Reception</b>								
Hot	400	650	\$40.00	\$40.00	\$26,000.00	\$6,240.00	\$1,934.40	\$34,174.40
Drink Ticket		1050			\$7,028.75	\$1,686.90	\$522.94	\$9,238.59
Attendant Fee	5		\$150.00		\$750.00	\$0.00	\$0.00	\$750.00
							<b>Event Total</b>	<b>\$44,162.99</b>

<b>Monday, July 10</b>							<b>Daily Total</b>	<b>\$42,727.06</b>
Item Description	QTY	Actual	Price		Net	Grat 24%	6% Tax	Gross
Coffee, Decaf, Tea	23	60	\$82.00	\$73.80	\$4,428.00	\$1,062.72	\$329.44	\$1,686.89
							<b>Event Total</b>	<b>\$1,686.89</b>
<b>Buffet Lunch</b>	650	650	\$44.00	\$39.60	\$25,740.00	\$6,177.60	\$1,915.06	\$33,832.66
							<b>Event Total</b>	<b>\$33,832.66</b>
Assorted Sodas by consumption	400	355	\$5.00	\$4.50	\$1,597.50	\$383.40	\$118.85	\$2,099.75
							<b>Event Total</b>	<b>\$2,099.75</b>
<b>Social Hour</b>								
Domestic Beers	70	32	\$5.00		\$160.00	\$38.40	\$11.90	\$210.30
Imported Beers	30	81	\$6.00		\$486.00	\$116.64	\$36.16	\$638.80
Wine - Red/White	130	204	\$8.00		\$1,632.00	\$391.68	\$121.42	\$2,145.10
Mixed Drinks		186	\$8.00		\$1,488.00	\$357.12	\$110.71	\$1,955.83
Assorted Soft Drinks	10	14	\$4.00		\$56.00	\$13.44	\$4.17	\$73.61
Bottled Water	25	16	\$4.00		\$64.00	\$15.36	\$4.76	\$84.12
							<b>Event Total</b>	<b>\$5,107.76</b>
<b>Tuesday, July 11</b>							<b>Daily Total</b>	<b>\$7,042.01</b>
Item Description	QTY	Actual	Price		Net	Grat 24%	6% Tax	Gross
Coffee, Tea, Decaf	60	63	\$82.00	\$73.80	\$4,649.40	\$1,115.86	\$345.92	\$6,111.17
							<b>Event Total</b>	<b>\$6,111.17</b>
Assorted Sodas by consumption	400	328	\$5.00	\$4.50	\$1,476.00	\$354.24	\$42.95	\$930.84
							<b>Event Total</b>	<b>\$930.84</b>



<b>Wednesday, July 12</b>							<b>Daily Total</b>	<b>\$65,772.34</b>
Item Description	QTY	Actual	Price		Net	Grat 24%	6% Tax	Gross
Coffee, Decaf, Tea	40	40	\$82.00	\$73.80	\$2,952.00	\$708.48	\$219.63	\$3,880.11
							<b>Event Total</b>	<b>\$3,880.11</b>
Local Fare Buffet	650	800	\$43.00	\$43.00	\$34,400.00	\$8,256.00	\$2,559.36	\$45,215.36
Custom Dessert Station	650	650	\$7.00	\$7.00	\$4,550.00	\$1,092.00	\$338.52	\$5,980.52
Attendant	4		\$150.00		\$600.00	\$0.00	\$0.00	\$600.00
Assorted Sodas by consumption	650	703	\$5.00	\$4.50	\$3,163.50	\$759.24	\$13.02	\$3,935.76
							<b>Event Total</b>	<b>\$55,731.64</b>
<b>Social Hour</b>								
Imported Beers	70	103	\$6.00		\$618.00	\$148.32	\$45.98	\$812.30
Domestic Beers	30	41	\$5.00		\$205.00	\$49.20	\$15.25	\$269.45
Wine - Red/White	105	229	\$8.00		\$1,832.00	\$439.68	\$136.30	\$2,407.98
Mixed Drinks		226	\$8.00		\$1,808.00	\$433.92	\$134.52	\$2,376.44
Assorted Soft Drinks	10	29	\$4.00		\$116.00	\$27.84	\$8.63	\$152.47
Bottled Water	20	27	\$4.00		\$108.00	\$25.92	\$8.04	\$141.96
							<b>Event Total</b>	<b>\$6,160.59</b>
<b>Thursday, July 16</b>							<b>Daily Total</b>	<b>\$25,386.32</b>
Item Description	QTY	Actual	Price		Net	Grat 24%	6% Tax	Gross
Breakfast	425	575	\$36.95	\$32.40	\$18,630.00	\$4,471.20	\$1,386.07	\$24,487.27
					<b>\$18,630.00</b>		<b>Event Total</b>	<b>\$24,487.27</b>
<b>Post Con Board Meeting</b>								
Lunch		19	\$36.00	\$36.00	\$684.00	\$164.16	\$50.89	\$899.05
							<b>Event Total</b>	<b>\$899.05</b>
<b>Conference Total</b>							<b>\$193,046.56</b>	
<b>Total Food &amp; Beverage</b>							<b>\$194,450.89</b>	

## SOCIAL EVENT SUMMARY

### Welcome Reception/Dueling Pianos

Dueling Pianos		\$4,450.00
Food & Beverage		\$44,161.29
<b>Total Event</b>		<b>\$48,611.29</b>

### Library of Congress

Venue - Rental, Security		\$29,605.04
Food & Beverage	1000 guest	\$109,450.00
Jazz Quartet		\$4,550.00
Transportation	15 buses	\$19,158.00
<b>Total Event</b>		<b>\$162,763.04</b>

## Audio Visual, Internet and Miscellaneous Charges

	TOTAL	Budgeted	Difference
NACM Board Meeting	\$550.00		
State Leadership Meeting	\$654.50		
Conference Audio Visual	\$79,407.17		
Exhibit Hall Microphone	\$233.75		
Conference WiFi (includes Board and Leadership)	\$14,133.69		
Total	<b>\$94,979.11</b>		
Exhibit Hall Security	\$640.00		
Total	<b>\$640.00</b>		

## HOTEL GRATUITIES

Day	Name	Amount
Thursday		
	Jacquie, CSM	\$250.00
	Seidale, Banquets	\$125.00
	Chris, Banquets	\$75.00
	Osman, Banquet Staff	\$50.00
	Osman, Banquet Staff	\$50.00
	Rosa, Banquet Staff	\$50.00
	Maria, Banquet Staff	\$50.00
	Antonio, Banquet Staff	\$50.00
	Viet, Banquet Staff	\$50.00
	Hanh, Banquet Staff	\$50.00
	Adrian, Set Up Crew	\$75.00
	Darius, Set up Crew	\$50.00
	Kwame, AV	\$125.00
	Eric, AV	\$100.00
	Jay, AV	\$100.00
	Delivery	\$20.00
	<b>TOTAL</b>	<b>\$1,270.00</b>
Return		\$230.00

Event:

**NACM-IACA 2017 Joint International Annual Conference**

	THUR 7/6	FRI 7/7	SAT 7/8	SUN 7/9	MON 7/10	TUES 7/11	WED 7/12	THUR 7/13	FRI 7/14	SAT 7/15	TOTALS
Contracted Room Block	24	48	180	510	510	600	468	90	0	0	2,430
Pickup 3/27	32	57	192	313	314	319	307	120	27	10	1,691
Pickup 4/3	32	57	206	359	361	369	354	133	30	11	1,912
Pickup 4/10	33	59	215	400	406	413	396	146	33	13	2,114
Pickup 4/17	34	62	223	435	445	454	436	157	35	15	2,296
Pickup 4/24	35	64	226	458	470	480	459	156	36	15	2,399
Pickup 5/01	22	63	227	477	494	502	482	146	40	15	2,468
Pickup 5/08	22	61	232	506	526	532	508	157	39	13	2,596
Pickup 5/15	25	71	241	521	541	548	524	168	38	13	2,690
Pickup 5/22	23	78	248	534	556	566	536	177	37	13	2,768
Pickup 5/29	23	77	243	533	557	564	532	172	38	13	2,752
Pickup 6/05	19	67	233	533	559	575	535	173	38	12	2,744
Pickup 6/12	19	68	229	528	559	581	537	173	34	9	2,737
Pickup 6/19	19	67	227	528	561	584	536	174	34	8	2,738
Pickup 6/26	18	66	226	525	559	579	530	168	32	7	2,710
Pickup 7/03	17	64	224	518	553	575	522	165	30	7	2,675
<b>FINAL</b>	<b>12</b>	<b>48</b>	<b>204</b>	<b>467</b>	<b>499</b>	<b>526</b>	<b>460</b>	<b>121</b>	<b>21</b>	<b>5</b>	<b>2,363</b>
Remaining	12	0	-24	43	11	74	8	-31	-21	-5	67
Pick-up Percentage	50%	100%	113%	92%	98%	88%	98%	134%	100%	100%	97%

Paid Registrations	Daily Registrations	Paying Speaker Reg	Comp Registrations	Total Minus Exhibit Staff	Exhibit Registrations	Overall Registrations	2016 Overall	2015 Overall
147	0	4	36			187		
207	0	5	37			249		
237	0	4	43			284		
267	0	4	55		1	327	92	66
279	0	6	56		1	342	144	76
296	0	7	60		1	364	183	109
343	1	8	60		19	431	203	168
373	1	12	63		27	476	284	232
435	1	14	68		36	554	305	257
479	1	16	71	567	39	606	366	330
550	1	22	85	658	58	716	418	370
611	1	32	107	751	72	823	436	408
662	1	32	114	809	86	895	490	442
674	4	32	116	826	130	956	541	469
686	4	33	115	838	141	979	603	482
685	5	29	118	837	140	977	622	508

# REGISTRATION HISTORY

ANNUAL CONFERENCES	2009 Boston	2010 New Orleans	2011 Las Vegas	2012 Orlando	2013 San Antonio	2014 Scottsdale	2015 Louisville	2016 Pittsburgh	2017 Crystal City
Paid Registrations									
Member	245	128	193	203	182	217	177	162	239
Nonmember	39	35	55	46	46	54	40	44	48
									168
ECP									
Member	0	3	23	22	28	47	38	35	36
Nonmember	0	0	5	2	1				
Group									
Member	0	76	48	64	1	69	79	75	89
Nonmember	0	34	39	87	5	47	50	59	105
Daily									
Member	1	1		2	5	16	1	1	
Nonmember	11	0		5	0	101	8	9	5
<b>Subtotal Paid Registrations</b>	<b>296</b>	<b>277</b>	<b>363</b>	<b>431</b>	<b>268</b>	<b>551</b>	<b>393</b>	<b>385</b>	<b>690</b>
Nonpaid Registrations									
Scholarships									
Member	0	0	38	28	27	15	12	1	5
Non Member	0	0	1	0					
Comps									
Member	5	22	28	33	37	44	36	32	33
Nonmember	4	5	10	9	18	19	6	10	8
									21
Volunteer									
Member				4					0
Nonmember				2					0
<b>Subtotal Nonpaid Registrations</b>	<b>9</b>	<b>27</b>	<b>77</b>	<b>76</b>	<b>82</b>	<b>78</b>	<b>54</b>	<b>43</b>	<b>67</b>
Speakers									
Member	21	20	15	9	11	22	22	38	51
Nonmember	20	19	19	19	29	24	39	53	29
<b>Subtotal Speakers</b>	<b>41</b>	<b>39</b>	<b>34</b>	<b>28</b>	<b>40</b>	<b>46</b>	<b>61</b>	<b>91</b>	<b>80</b>
<b>Subtotal Exhibit Staff</b>	<b>136</b>	<b>138</b>	<b>145</b>	<b>180</b>	<b>108</b>	<b>125</b>	<b>134</b>	<b>101</b>	<b>140</b>
<b>TOTAL Conference Attendees</b>	<b>482</b>	<b>343</b>	<b>474</b>	<b>535</b>	<b>390</b>	<b>675</b>	<b>508</b>	<b>519</b>	<b>837</b>
<b>TOTAL Including Exhibit Staff</b>						<b>800</b>	<b>642</b>	<b>620</b>	<b>977</b>

# NACM 2017 Annual Conference Survey Results

♥ = Recorded Session

Monday, July 10th, 2017

Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Plenary: The Challenge of Excellence on a Global Scale: Chief Justice Perspectives from Around the World ♥		153	4.0	Kenneth Benjamin	4.1	4.1
				Mary McQueen	4.2	4.2
				Hon. John Minton	4.0	4.0
				MA Yuanjie	3.8	3.7
				Moeng Moeng	3.9	3.8
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Who is a Journalist? Changing Legal Definitions and Implications for Courts, as seen in New Zealand, Australia, and the United States	55	21	4.0	Jane Johnston	4.1	4.0
				Anne Wallace	4.1	4.0
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
National Task Force on Fines, Fees, and Bail Practices- Resources, Tools, and Challenges ♥	128	27	3.8	Dave Byers	4.3	4.3
				Laurie Dudgeon	4.1	4.1
				David Slayton	4.3	4.3
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Extending the NACM CORE to Your Court: Caseflow Management and Resources, Budget, and Finance ♥	150	33	3.8	Alfred Degrafinreid	4.2	4.2
				Kathryn Griffin	3.7	3.6
				Greg Lambard	4.1	4.1
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Remote Delivery of Access to Justice: The Path to Implementation and the Partnerships Along the Way	90	14	4.1	Renee Danser	4.4	4.3
				Mirenda Meghelli	4.4	4.3
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
The Challenges of Excellence on a Global Scale [Breakout Session Following Keynote Panel]	54	15	4.3	Jeff Apperson	4.4	4.3
				Mary McQueen	4.4	4.4



Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Transforming the Public Experience of Justice: Three Countries, One Goal	152	15	3.2	Neil Doherty	3.0	3.0
				Frank Greene	3.6	3.5
				Barbara Marcille	3.6	3.6
				Harold Epineuce	2.9	2.9
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Defining Legal Advice and Legal Information with an International Emphasis	54	11	3.9	John Greacen	3.9	3.8
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Managing a High Profile Case in Your Court – Lessons Learned from the Prince Case	165	26	4.4	Hon. Kevin Eide	4.7	4.7
				Kristen Trebil-Halbersma	4.7	4.7
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Judges, Staff, and Money-How Can they be Fairly Allocated? The U.S. Federal Judiciary Shares its Secrets	80	9	4.3	Jim Baugher	4.2	4.1
				Elizabeth Wiggins	4.2	4.3
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
The (un)Balanced Life [Breakout Before Plenary Session] 🍷	200	35	4.6	Pierre Quinn	4.9	4.8
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
New Guidelines for Public Access to Court Records: What has Changed? (Sponsored by the Joint Technology Committee and the Court Information Technology Officers Consortium) 🍷	128	28	4.0	Tom Clarke	4.5	4.5
				Kevin Iwersen	4.4	4.4
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
AidData, Foreign Assistance, and the Rule of Law: Examining Justice Sector Reform in Practice	46	4	4.3	Suren Avenesyan	4.3	4.5
				John Cipperly	4.5	4.0
				Matthew Kleiman	4.0	4.3

Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Innovative Strategies for Assessing Risk in Domestic Violence Cases and Obtaining Access to Justice 🧡	128	13	4.2	Julietta Marotta	4.2	4.2
				Robyn Mazur	4.2	4.2
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Ethics, Integrity, and the Courts: Judicial Independence Confronting Malfeasance	152	23	3.9	Peter Kiefer	4.1	4.1
				Susan Organ	4.0	4.0
				Karl Thoennes	4.1	4.1
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Best Practices in Adult Drug Courts: Promoting Fidelity to the Model	17	7	3.9	Mary Kay Hudson	3.9	4.0
				Rick Schwermer	4.0	4.0
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Leading and Managing when Status, Power, and Control Collide: The Story of Presiding Judges and Court Administrators	80	13	3.8	Luis Palma	3.8	3.7
				Maureen Conner	4.0	4.1
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
The Future is Now: Online Dispute Resolution and the Courts (Sponsored by the Joint Technology Committee and the Court Information Technology Officers Consortium)	102	22	4.2	Alex Sanchez	4.4	4.3
				Fabricio Bittencourt da Cruz	4.2	4.1
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
The Evidence Behind Effective Customer Service: Procedural Justice and Fair Treatment 🧡	157	35	3.6	Margaret Allen	4.1	4.0
				Emily LaGratta	4.2	4.2
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Plenary: Justice Demands the Best You 🧡		97	4.3	Pierre Quinn	4.6	4.6

Tuesday, July 11th, 2017

Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
The Power of Culture: Working Together to Achieve Justice 🤝		106	4.2	Jon Rapping	4.4	
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
How We Can Resist a Culture of Injustice and Help Reform the System From Within (Breakout Following Plenary)	148	15	4.2	Genevieve Citrin Ray	4.3	4.4
				Jon Rapping	4.5	4.6
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
How Court Administrators as Public Servants Can Engage the Public 🤝	128	21	4.2	Karen Freeman-Wilson	4.4	4.6
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Cybersecurity and the Courts (Sponsored by Mitre)	97	22	3.5	Amgad Fayad	3.7	3.7
				Brett Moseley	3.8	3.8
				Michele Stovall	3.9	4.0
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Civil Case Management Teams (CCMT) in Action: What are they and how well do they do?	66	17	4.1	Thomas Rebull	4.2	4.2
				Yanitza Madrigal	4.3	4.1
				Paula Hannaford-Agor	4.1	3.9
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Design for Dignity and Fairness in Contemporary Courthouses	77	11	3.6	David Tait	4.2	3.8
				David Insinga	4.1	3.8
				Robert Fisch	4.2	3.8
				Noel Doherty	4.2	3.8
				James Beight	4.0	3.6
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Court Leader Excellence: Competencies and Roles (NACM Guide and CORE*) 🤝	125	14	4.6	Janet Cornell	4.6	4.6

Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
International Framework for Court Excellence and the High Performance Court Framework: Contrasts and Comparisons 🇳🇱		85	3.6	Pim Albers	3.9	3.9
				Violaine Autheman	4.0	3.9
				Dan Hall	3.8	3.8
				Matthew Kleiman	4.0	4.0
				Gregory Reinhardt	3.8	3.8
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Plenary Follow Up: Traveling the Path to Court Excellence 🇳🇱	55	11	4.3	Kevin Bowling	4.5	4.4
				Danielle Fox	4.5	4.5
				Dan Hall	4.1	4.3
				Christina Malia	4.5	4.4
				Jennifer Marie	4.4	4.3
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Leveraging Technology to Improve Customer Service and Track Performance	80	15	4.0	Joseph Vellon	4.6	4.5
				Nelly Montenegro	4.6	4.3
				John King	4.7	4.4
				Rita Blandino	4.5	4.4
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Continuous Process Improvement (CPI) and the Judiciary: Case Studies in Process Improvement in the U.S. Federal Courts and Judiciaries Across Europe	44	4	4.5	Robbie Westmoreland	4.5	4.5
				John Stacey	4.3	4.5
				Michael Milby	4.8	4.8
				David Bradley	4.5	4.5
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Implicit Biases: How Our Amazing Brains Can Lead Us Astray 🇳🇱	200	36	4.1	Kelly Tait	4.6	4.5
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Judicial Security-At Work, at Home, and on the Internet	74	15	4.0	Thomas Figmik	4.5	4.5
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Big Data and Artificial Intelligence and the Impact on the Administration of Justice (Sponsored by Mitre)	147	15	4.0	Margaret Hagan	4.3	4.3
				L. Karl Branting	4.3	4.2

Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Past, Present, and Future of Cloud Computing (Sponsored by the Joint Technology Committee and the Court Information Technology Officers Consortium)	50	10	4.4	Peter Smolianski	4.4	4.3
				Heather Pettit	4.4	4.4
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Plenary Follow Up: Keeping the Journey on Course	21	4	4.3	Tin Bunjevaca	4.3	4.3
				Philip Langbroek	4.3	4.0
				Richard Schauffler	4.3	4.3
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Community Engagement in the State Courts: Learn About the Tools Developed to Engage with Minority and Disadvantaged Communities 🤝	75	13	4.1	Amy Quinlan	4.1	4.0
				Nina Hess Hsu	4.1	4.0
				Joseph Hamm	4.2	4.2
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Judicial and Administrative Capacity Building-Comparative Experiences in the United States, France, Japan, and Abu Dhabi	58	7	4.0	Tim Dibble	4.4	4.4
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
How Can You Fix Your Guardianship System? Lessons from National and State Reform Efforts 🤝	25	4	3.3	Brenda Uekert	4.0	3.8
				Jeffery Rinard	4.0	3.5
				Cate Boyko	4.0	3.8
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Leadership from the White House to the Courthouse: Four Practices of Effective Leaders	135	32	4.6	Michael Eric Siegel	4.8	4.8

Wednesday, July 12th, 2017

Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
The Legal History, Neuroscience, and Toxicology of Marijuana: What the Justice System Needs to Know	152	24	4.8	Mary Celeste	4.7	4.8
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Succeed Through Achievement and Resilience-An Alternative Program for Minor Victims of Sex Trafficking 🧡	30	9	4.3	Hon. Catherine Pratt	4.3	4.3
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Connecting Courts, Connecting Justice: Recognition and Enforcement of Civil Judgments	39	8	4.1	Mark Beer	4.5	4.3
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Case Management Cookbook: Three Key Ingredients to Building a Successful Case Management System [Sponsored by Thomson Reuters]	80	9	4.1	Kendall Smith	4.1	4.1
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Protecting Your Court: Practical Facility Enhancements for Your Courthouse from Enhancing Security to Technology Improvements to Strategic Solutions	25	7	4.6	Nathan Hall	4.3	4.4
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
How Equal Will We Be? The Future Focus of Access to Justice 🧡	63	14	4.0	Anne Wallace	4.4	4.4
				Phil Knox	4.3	4.4
				Peter Kiefer	4.3	4.3
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Trauma Awareness and Resilience Strategies for Work and for Life 🧡	126	31	4.6	Hon. Shaun Floerke	4.9	4.9
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Global Lessons in Creating a Performance Culture: Management, Training, and Incentives	152	15	4.2	Georgia Harley	4.3	4.2
				Lin Hammergren	4.2	4.2
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
The Justice Goal of the United Nations Sustainable Development Goals: An Invitation to Excellence for Justice Systems	50	5	4.8	Ingo Keilitz	4.8	4.8
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Excellence in Social Media: Challenges and Successes that Courts Internationally have Faced when Using Social Media to Engage the Public	103	19	4.1	Marilyn Bromberg	4.6	4.6
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Effective Juror Orientation 🧡	50	8	4.4	Paula Hannaford-Agor	4.6	4.5
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Promoting Efficiency and Quality of Justice-The European Commission for Efficiency of Justice Perspective	23	3	3.3	Ivana Borzova	3.3	3.0

Thursday, July 13th, 2017

Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Courts Disrupted: How Technology and Innovation Have the Power to Improve as well as Disrupt Court Business Practices 🐼		76	4.3	Margaret Hagan	4.2	4.2
				David Slayton	4.4	4.4
Session Title	# of Attendees	# of Responses	Overall Score	Speakers	Speaker Content	Speaker Presentation Skills
Change! Emerging Trends Impacting the Administration of Justice Around the World 🐼		62	4.4	Gary Marchant	4.5	4.4

# **NACM 2017 Annual Conference Survey Results**

## **General Results**

**Please tell us about yourself.**

**I work in a: (q1)**

Municipal or Limited Jurisdiction Court	9	11.5 %
Trial or General Jurisdiction Court	34	43.6 %
Intermediate Court of Appeals/Supreme Court	3	3.8 %
State Court Administrator's Office or AOC	11	14.1 %
Federal Court	7	9.0 %
Tribal Court	0	0.0 %
NA – I do not work for a court	6	7.7 %
Other (specify):	8	10.3 %
Federal Court ED agency		
academic		
Juvenile and domestic relations		
Supreme Court - Court of Appeal		
Court administration in Latvia		
consultant		
RETIRED		
Council of Justice		
<b>Total</b>	<b>78</b>	<b>100.0 %</b>

**What types of cases does your court hear? (Check all that apply) (q2)**

Criminal	11	68.8 %
Juvenile	5	31.3 %
Civil	7	43.8 %
Family	3	18.8 %
Probate	1	6.3 %
Traffic	11	68.8 %
Other limited jurisdiction	3	18.8 %
Appeals for the case types checked above.	1	6.3 %
Other (please specify):	4	25.0 %
NA		
Dont work for court		
previously in LJ court		
Housing		
<b>Total</b>	<b>16</b>	<b>100.0 %</b>

**How many years have you worked for a court or judicial office? (q3)**

0-5	1	6.3 %
6-10	2	12.5 %
11-15	4	25.0 %
16+	7	43.8 %
I don't work for a court or judicial office.	2	12.5 %
<b>Total</b>	<b>16</b>	<b>100.0 %</b>



Which best describes your role in your organization? (q4)		
Judge/Judicial Officer	1	6.3 %
Court or District Administrator	7	43.8 %
State Court Administrator	0	0.0 %
Front Line Supervisor	2	12.5 %
Mid-level Manager in Court Administration	0	0.0 %
Program Manager or Supervisor	0	0.0 %
Elected or Appointed Clerk of the Court or Manager in the Clerk's Office	1	6.3 %
Public Information Officer	0	0.0 %
Judicial Educator	1	6.3 %
Attorney	0	0.0 %
Other (please specify):	4	25.0 %
professor		
Director of court and land registry department		
RETIRED		
Court Administrator		
<b>Total</b>	<b>16</b>	<b>100.0 %</b>

How many judges serve in your court? (q5)		
0-3 judges	6	37.5 %
4-10 judges	5	31.3 %
11 or more judges	1	6.3 %
Not Applicable	4	25.0 %
<b>Total</b>	<b>16</b>	<b>100.0 %</b>

Exhibitors play a valuable role in the NACM conferences. In addition to bringing attendees new and innovative products, the exhibitor fees help to offset conference registration, food, and hotel costs. How much time did you spend in the exhibit hall (excluding the social hour)? (q6)		
I did not attend	2	12.5 %
Less than 1/2 hour	1	6.3 %
30-60 minutes	9	56.3 %
61-90 minutes	2	12.5 %
Over 90 minutes	2	12.5 %
<b>Total</b>	<b>16</b>	<b>100.0 %</b>

Tell us which best describes your role in your organization's decision-making process relating to purchasing products or services for your organization: (q7)		
I make the final decision.	5	31.3 %
I am part of a team of decision-makers.	8	50.0 %
I gather information and report to others who make the final decision.	1	6.3 %
I am not involved with the decision-making process.	2	12.5 %
<b>Total</b>	<b>16</b>	<b>100.0 %</b>

How many years have you worked for a court or judicial office? (q8)		
0-5	8	14.5 %
6-10	6	10.9 %
11-15	11	20.0 %
16+	30	54.5 %
I don't work for a court or judicial office.	0	0.0 %
<b>Total</b>	<b>55</b>	<b>100.0 %</b>

Which best describes your role in your organization? (q9)		
Judge/Judicial Officer	1	1.8 %
Court or District Administrator	26	47.3 %
State Court Administrator	5	9.1 %
Front Line Supervisor	1	1.8 %
Mid-level Manager in Court Administration	8	14.5 %
Program Manager or Supervisor	4	7.3 %
Elected or Appointed Clerk of the Court or Manager in the Clerk's Office	3	5.5 %
Public Information Officer	0	0.0 %
Judicial Educator	2	3.6 %
Attorney	1	1.8 %
Other (please specify):	4	7.3 %
Executive Assistant		
Career Law Clerk		
CIO		
Chief Registrar of the Supreme Court of Cameroon		
<b>Total</b>	<b>55</b>	<b>100.0 %</b>

How many judges serve in your court? (q10)		
0-3 judges	6	10.9 %
4-10 judges	15	27.3 %
11 or more judges	31	56.4 %
Not Applicable	3	5.5 %
<b>Total</b>	<b>55</b>	<b>100.0 %</b>

Exhibitors play a valuable role in the NACM conferences. In addition to bringing attendees new and innovative products, the exhibitor fees help to offset conference registration, food, and hotel costs.

How much time did you spend in the exhibit hall (excluding the social hour)? (q11)

I did not attend	9	16.4 %
Less than 1/2 hour	4	7.3 %
30 - 60 minutes	21	38.2 %
61 - 90 minutes	11	20.0 %
Over 90 minutes	10	18.2 %
<b>Total</b>	<b>55</b>	<b>100.0 %</b>

Tell us which best describes your role in your organization's decision-making process relating to purchasing products or services for your organization: (q12)

I make the final decision.	7	12.7 %
I am part of a team of decision-makers.	24	43.6 %
I gather information and report to others who make the final decision.	17	30.9 %
I am not involved with the decision-making process.	7	12.7 %
<b>Total</b>	<b>55</b>	<b>100.0 %</b>

Check any of the following that your court may purchase or enhance in the next 1-3 years? (q13)

Building addition or remodeling	20	36.4 %
Court Information System	12	21.8 %
Collection Database or services	7	12.7 %
eFiling Database or Services	15	27.3 %
Website services or products	17	30.9 %
Calendaring Display Software	9	16.4 %
HR software	5	9.1 %
iCloud storage	6	10.9 %
Office Furniture	23	41.8 %
HR Software	3	5.5 %
Finance Software	2	3.6 %
Learning Management System	4	7.3 %
Other (please specify):	3	5.5 %
Jury Management		
hardware		
electronic recording system, security camera system		
<b>Total</b>	<b>55</b>	<b>100.0 %</b>

What topics and/or presenters would you like to see at a future conference? (optional) (q14)		
General Relationships between judges themselves especially in multimember courts		
NCSC court excellence models, global chief justices, leadership models from various sectors		
How law clerks are utilized in courts around the world.		
Employee satisfaction		
sharia courts; indigenous justice		
IT and building security.		
Technology options for court programs. Succession planning Discussion groups for disciplines		
Keep having tech topics, like at this conference. Sure was nice to have new speakers we have never seen before here, especially the international folks. We should continue to partner with IACA to identify new things and good speakers. Bring Pim Albers back, for instance.		
I felt this was too American based and very low level. I will not be attending another NACM conference as it does not meet my needs		
Justice demands the best you. You may consider repeating it yearly		
1) operational issues surrounding implementation of technology 2) comparison of US to international courts		
I would like to see Judge Shaun Floerke as a plenary speaker. His presentation on trauma was one of the best I saw all week.		
Loved the plenary given by Pierre - so on point. More like this that applies directly to court management.		
continue to expand on the access to justice area especially incorporating tech tools		
Emerging technology, cyber security, leadership, HR trends, motivating employees, judge/court administrator teamwork, budgeting essentials, info about ICM and SJI		
More research and innovative ideas		
An orientation to becoming a Fellow, summarize how it can benefit you and the Association.		
Would enjoy another course on resilience, leadership traits, taking court leadership concepts and putting them into practice.		
The future of AI in court systems		
The core mission of the Trial Courts		
Sessions on: *New/Useful apps relevant to court environment *Practical HR tips for keeping/retaining employees. Employee growth/empowerment. *Security tools, tips, tricks for medium, small, rural courts that don't have bailiffs/armed security. *New and emerging topics, like artificial intelligence what impact it may have on the profession of court administration		
all		
Possible keynotes that might appeal to a broad audience: Daniel Levitin: "The Organized Mind: Thinking Straight in an Age of Information Overload" Barbara Oakley: "Learning How to Learn"   Talks at Google Matt Abrahams: Think Fast, Talk Smart: Communication Techniques Breakout sessions: Tech innovations - an update on the latest and greatest software, apps, etc. Similar to tech sessions offered at CTC and eCourts. Update from Harvard's Access-to-Justice Lab. Developing successful training programs for non-judicial staff members.		
Retaining interpreters for rural courts		
Would like an update on on-line dispute resolution. Both presenters this year had a limited number of cases that had been handled. I would like to see larger numbers and outcomes.		
a couple of sessions geared toward challenges municipal courts face would be very helpful		

How many NACM conferences have you attended? (q15)		
	1	26 35.6 %
2-4		17 23.3 %
5 or more		30 41.1 %
Total		73 100.0 %

Did you find the conference app: (q16)		
Helpful	68	93.2 %
Not Helpful	3	4.1 %
Other	2	2.7 %
Slightly helpful when notifications were pushed		
didn't use/need		
Total	73	100.0 %

Who paid for your attendance at the conference? (g17)		
Registration Fee (g17_1)		
Court/Business	58	78.4 %
Self	7	9.5 %
Other (Specify)	8	10.8 %
Total	74	100.0 %

Travel (g17_2)		
Court/Business	53	71.6 %
Self	12	16.2 %
Other (Specify)	8	10.8 %
Total	74	100.0 %

Other		
Other (Specify)		
DOJ		
partially by court		
Court administration of Latvia		
Intl		
court/self combination		
Judge		
State Association		
waived		
locality budget		

Please share any information to improve our NACM Conference. (optional) (q18)		
Good conference		
Nothing it was great!!		
I thought the combined conference had its plusses but at times, it seemed too big. I couldn't get into several breakout sessions, and they were not repeated. Maybe a shorter conference?		
It was well organized. However, there were no examples from Africa which is doing very well.		
Some speakers were far more qualified as presenters than were others. Mayor of Gary was not effective at all, though I admire her as a person.		
Have more friendly representatives checking in. Very disappointed at the lack of give a damn attitude when I showed up.		
The social events were too loud. It was nearly impossible to socialize. I would like a more cozy atmosphere.		
Nothing to suggest. This conference was spectacular!		
Bigger venue or preregistration for courses. I was unable to attend my first choice on many occasions even though I was there early		
Sessions that had a discussant or contrary view were more engaging. Those that had one person reading a long speech were less useful. Food was terrific.		
Breakfast everyday.		
Always a great conference and opportunity. The International component was a great addition. Would be nice if when coffee/beverages are served they could be served on each floor where there are conference rooms - it was hard to get from the 3rd floor down and back without being disruptive.		
First time attending I thought it was absolutely awesome		
The opening reception was great, except the music was too loud for such a small space -- couldn't talk very easily. Site was outstanding (DC), unlike a couple of more recent cities.		
For my first time, I learnt a lot.		
Enjoyed the conference, but wish it was at a better location. There are many better options in the D.C. Region that would have been walkable to restaurants/attractions and the metro. I hope you keep that in mind for future conference planning.		
some of the topics seems to be present on every conference agenda, which limits interest.		
Not having some sort of breakfast available made it difficult for those that are used to having breakfast. Not too many other local options in DC hotel area.		
No need improvements		
The hotel was terrible, the topics were all American centric and low level. I prefer IACA conferences that are focussed on international initiatives. NACM seems a little out of touch and quite behind the rest of the world...		
It was great		
Format is on point		
Conducting the business meeting on Thursday morning was a great idea and should be the standard moving forward.		
It was great		
While the hotel was a little old the service was wonderful and the food was just awesome!!!!!!!		
It would be nice for the conference app to allow you to make your own schedule and then to advance when the days advance.		
Show the faculty names on the summary schedule		
The conference is excellent as is.		
Please don't direct unsolicited vendor information to me. I'll just delete it.		
The conference was very good. Maybe, more room for the popular seminars so no one gets shut out.		
This was a fantastic conference. I was amazed that it was so relevant to the municipal court level. D.C. was beautiful and an inspiring venue for the conference.		
Not sure how to articulate this in a respectful fashion. While it was a pleasure to meet and to learn from so many international visitors, is there a way to convey during the registration process that, in the U.S., females are considered "equal" to males? I do not mean just manners / social skills due to cultural differences, I try to be tolerant of that. I am referring to things like blatant disregard when a woman was speaking, taking a woman's seat (and not a man's who's also was vacant for a moment), cutting in front of women in lines, etc. -The elevator and bathroom situation at the hotel was horrendous. There were not enough elevators when everyone was leaving at the same time. There also were not nearly enough female restrooms in the meeting room areas. -Please request pre-registration for break-out sessions so you can determine the most popular topics and put those in the largest rooms. More than once, I could not get into the session I wanted, partly because I couldn't get there fast enough.		
Great conference! The entire event was informative, and easy to navigate through. The social events were all networking supportive and very enjoyable. I would be interested in seeing more sessions that offer not only problem statements and solution options but the data collection methods and the tools utilized for success measurement as well. Thank you!		

Thanks to all conference planners and on site staff/volunteers. The combined NACM and IACA attendees provided a wonderful learning and networking environment.		
Great location.		
Some of the topics this year were presented more for someone ew to the court. While there are a lot of younger administrators, most of us have been doing this for awhile.		
Just make sure any rooms for breakout sessions are going to be big enough to hold the majority of the people that want to attend a session. For example, the Conference Theater this time was too small with a capacity of only 89, yet you had 800+ attending and 6 breakout sessions each time, so 89 wasn't going to cut it.		
The rooms that sessions were held in needed to be bigger. Almost every session was packed and many had to turn away participants. Also, meals need to be better planned. Too many people standing with no where to sit and eat. Overall it was an excellent conference!		
all was good		
Gluten free or vegan/vegetarian meal options. There were very few things for someone with this type of meal requirement to actually eat, which was somewhat disappointing.		
Maybe a pre-class signup would be a good option to ensure that there would be adequate space for every class. There were a lot of classes that either ran out of space and not enough chairs or were simply just not in a room big enough.		
It was wonderful but with it being my first conference I was overwhelmed.		
I would like to see more substantive presentations offered next time. I found the plenary sessions very light and was looking for more intellectually challenging, informative sessions.		
I thought it was a very good idea to bring these two groups together. It was a pleasure to meet and learn from them.		
Door prizes from vendors, should have ben given out at the Conference, not made phone calls to the winners. Business Cards had our work number on it, and I was not at work.		
great job this year-well done		
The speakers from the last day of the conference were the best speakers of the whole conference. Unfortunately, a good chunk of the audience had already left. Breakout sessions were good; could be improved by having different tracks (international, technology, security, personal growth, empowering employees, etc). Several sessions were closed because they were too popular. Needed bigger rooms for several of the sessions as there simply weren't enough chairs.		
Conference was great. I will attend next year.		
The conference programming was excellent this conference. My only suggestion is that NACM seriously consider rethinking the practice of having "panel" keynotes. Panel keynotes are rarely executed well. Although Monday's keynote was interesting and well-executed (thanks to a skilled moderator and diverse panelists), most are not. Even with the skilled moderator, there was potential for the SA judge to overtake the panel discussion.		
The roof networking social hour was a bit disjointed/hectic. It seemed a smaller space for this given the # of people attending & it was loud and difficult to get up there. Hardly room to walk about. Also long wait for an elevator and several flights to walk up if one chose that route.		
Not enough seating for most of the breakout sessions and the library of congress event. It would have been nice to have the vendors there for more hours/days. It was helpful to not have any other sessions going on at the same time, but that was too many people trying to see the vendors in a short period of time.		
I know it was a joint conference with international court administrators. However, it was a little disappointing that more sessions weren't available for small, rural courts.		
I did not respond because it stated (optional).		
I really enjoyed this conference on many levels. The breakout sessions were generally very good. Panel discussions leave something to be desired. Evening events great. Having said that, the poor attendance at the vendor show is something to be noted. While I ditched because I wanted to see some of DC, the shows are always the same and duplicates of the CTC. Moving forward you may want to consider not relying on vendor money so much. I'm kind of seeing them as something from the past since I can find the same info on-line.		
Please make attendees sign up for breakouts in advance. That way the sessions will be in large enough rooms to accommodate the attendees. I missed one session because all of the rooms were full - and I did not delay getting to the room; however, the elevator situation also caused some issues. Trying to herd so many people from the basement to the 3rd floor with only a few elevators was an issue. I felt the content this year (especially the last 2 plenary sessions on Thursday) was outstanding! Really rejuvenated me and made me excited to be a part of court administration! The Library of Congress Event was also spectacular! Thank you! My only negative comment would be that some of our international guests were very rude to women. Perhaps I am used to working with male colleagues who are well versed in social graces; but, it was obvious SOME of the international men did not respect women. Thank you for an overall delightful experience. I thoroughly enjoyed the conference!		
as stated above, more sessions geared toward municipal courts would be wonderful. we're the courts most people come into contact with.		
It was awesome.		

## General Services Contractor (GCS) SAVINGS

CATEGORY	List Price	Discounted Price	=	Savings
<b>Service Contractor-Freeman</b>				
Exhibit Hall	\$ 4,917.95	\$ 1,551.20		\$3,366.75
Registration	\$ 7,519.35	\$0.00	=	\$7,519.35
Signage	\$ 7,196.52	\$ 3,041.51	=	\$4,155.01
Warehouse Shipments	\$ 1,410.00	\$ -	=	\$1,410.00
Labor	\$ 3,325.00	\$ 2,660.00	=	\$665.00
TOTAL	\$ 24,368.82	\$7,252.71	=	\$17,116.11
<b>TOTAL SERVICE CONTRACTOR (includes taxes)</b>				<b>\$7,252.71</b>

## EXHIBIT BOOTH AND SPONSORSHIP REVENUE SUMMARY

[illegible]



SPONSORSHIP SUMMARY					
		Sponsor Fee	Actual Cost	NET Revenue	
AllianceOne	Fun Run	\$4,000	\$1,348	\$2,652	
equivant	WiFi	\$9,000	\$14,134	-\$5,134	
Journal Technologies	Water Bottle	\$5,500	\$4,998	\$502	
Linebarger Goggan	Schedule	\$4,300	\$2,276	\$2,024	
MITRE	Program	\$7,500	\$1,340	\$6,160	4 Comp Reg's in lieu of Booth Fee
Thomson Reuters	Program	\$7,500	\$165	\$7,335	Booth \$15; 2 Library Tickets \$150
Tyler	Platinum/Hub	\$14,000	\$330	\$13,670	2 Booths \$30; 4 Library Tickets \$300
	Lanyards	\$3,000	\$2,900	\$100	
<b>TOTAL</b>		<b>\$54,800</b>	<b>\$27,491</b>	<b>\$27,309</b>	

# NACM-IACA 2017 Conference Budget

updated 8-30-17

	Actual	Notes	
<b>REVENUE</b>			
Registration - Regular (This figure will be reduced if group, ecp, dual partner and daily registrations are received)	\$ 422,235.12	includes speakers	Reg fee waived for NACM/IACA Boards and NACM Past Presidents (45)
Social - Other Income Fees	\$ 13,485.00	fun run, guests to library of congress	
Exhibitor	\$ 182,800.00		
Sponsor	\$ 54,800.00		
Grant	\$ 91,039.00	2015 SJI NACM Grant Requests specific to conference	
<b>TOTAL REVENUE</b>	<b>\$ 764,359.12</b>		
<b>EXPENSES</b>			
<b>Speaker, Travel and A/V</b>			
Travel for Presenters	\$ 8,892.05		
Honoraria - Presenters	\$ 8,300.00	out of pocket honoraria	
Leadership Seminar Audio Visual	\$ 654.50		
NCSC-Staff Travel	\$ 7,374.47	includes Freitas room	
Audio, Video, & Plenary speaker projection on large screen	\$ 93,540.86	includes internet	
Live streaming & recording	\$ 26,200.00		
<b>Subtotal</b>	<b>\$ 144,961.88</b>		

<b><u>Food &amp; Beverage</u></b>			
Leadership Seminar	\$	220.42	Coffee added on site
ECP & First Time Attendee Reception	\$	1,880.10	drink tickets
Opening Reception	\$	45,215.67	hot and cold appetizers
Dueling Pianos	\$	4,450.00	
Monday expenses	\$	37,255.70	coffee service, lunch and pm sodas
Tuesday Breakfast and beverages	\$	20,298.32	coffee service, breakfast and pm sodas
Tuesday Social Event	\$	151,427.57	28673 Venue Rental \$17,500 Reception \$109,450.40 Transportation \$19,927.17 Entertainment \$4,550 75,000 + tax \$5,500 (tax added) 19,320 3,000
LOC Final Bill	\$	12,105.04	
Wednesday exhibit lunch and break	\$	57,260.58	Hyatt estimated costs Beverages all day, 850 Lunch (including exhibitors) & PM sodas
Thursday beverages and lunch	\$	25,038.73	Hyatt estimated costs coffee service and lunch
Social Hour	\$	11,522.00	
<b>Sub total</b>	\$	366,674.13	

<b>Conference Expenses</b>				
Service fee for credit card payments	\$	12,835.43		
Conference Gratuities	\$	1,270.00		
Printing	\$	898.78	Badges and badge holders	Reduced from \$2,500
Photographer	\$	3,363.75		Reduced from \$3,500
Insurance, Licensing, Fees	\$	2,015.00	includes ASCAP license	Updated 1-3-17 - terrorism insurance added because conference in DC
Exhibitor setup/take down	\$	8,401.75	includes microphone	
Conference App	\$	1,998.40		
Security - Exhibit show	\$	640.00		
Rekey Office				
Security - Conference			unknown	
Fun Run Shirts	\$	1,554.70	sponsor item	<b>includes race bibs, safety pins and prizes</b>
Schedule at a Glance	\$	2,276.00		
Lanyards	\$	2,904.08	sponsor item	
Water Bottles	\$	4,998.47		
Freight - Shipping of materials	\$	1,001.70		
<b>Subtotal</b>	<b>\$</b>	<b>44,158.06</b>		
<b>TOTAL EXPENSES</b>	<b>\$</b>	<b>555,794.07</b>		

<b>Estimated Net Gain/Loss from conference</b>	<b>\$</b>	<b>208,565.05</b>	<b>Shared based on headcount of attendees</b>
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Deposit of \$17,500 paid to Library of Congress 5-15 \$5,833 IACA; \$11,667 NACM  
\*\*NCSC Supports Conference Planning for NACM - The cost to NACM for the annual conference is estimated at \$103,444.20  
IACA portion=\$34,477.95 or 33.33%

Owed NACM:

NCSC Conference Planning	\$	34,477.00
IACA Board Meeting	\$	522.55
Library of Congress Deposit	\$	(5,833.00)

Missing \$1700 from  
Singapore

NO SHOWS - NOT Paid

First Name			Last Name	Registration Type		
Man			Karki	IACA MEMBER	\$	417.00
Ishwor			Khatiwada	IACA MEMBER	\$	417.00
Tiago			Martins	IACA MEMBER	\$	417.00
Borche			Mircheski	IACA MEMBER	\$	417.00
Nripa Dhwoj			Niroula	IACA MEMBER	\$	417.00
Keshari			Pandit	IACA MEMBER	\$	417.00
Narayan			Regmi	IACA MEMBER	\$	417.00
					\$	2,919.00

**National Association for Court Management and Michigan State University Judicial  
Administration Program  
Implementation and Management Plan for Offering Judicial Administration  
Certificate Courses Through NACM at the Annual Conference – Effective  
beginning \_\_\_\_ annual conference**

**I. Signatories and Bestowment**

National Association for Court Management (NACM), as a partner-provider with Michigan State University Judicial Administration Program (MSUJAP), is a joint signatory with Michigan State University on all certificates resulting from an individual's successful completion of the Judicial Administration Certificate consisting of 60 contact hours and a capstone project when the student completed the courses through NACM. The certificate is bestowed on behalf of NACM and MSUJAP. The NACM President, Director of the Judicial Administration Program, and the Director of the MSU School of Criminal Justice sign each certificate.<sup>1</sup> See **Appendix A** for a sample certificate.

**II. Student Requirements**

Students must complete 10-courses within five years of admittance to the program followed by a capstone project. See **Appendix B** for the Judicial Administration Program brochure. The courses have their foundation in the competencies identified for the court administration profession by NACM and other associated court organizations and associations. The capstone project requires that students utilize the knowledge and skills gained during the certificate program to address an opportunity or problem within the justice sector. See **Appendix C** for the capstone project instructions.

**III. MSUJAP Responsibilities for the Judicial Administration Certificate Program Courses Offered Through NACM**

A. MSUJAP is responsible for insuring that the required content for each course is met and it does so through a course approval form and review of instructor credentials and the partner-provider's conference/program agenda. See **Appendix D** for the course approval form.

B. MSU JAP engages in a faculty development process with course instructors to ensure content integrity and the use of adult teaching methodologies.

C. MSUJAP, in collaboration with NACM, develops a five-year plan for the delivery of the 10-courses through the NACM annual conference. See **Appendix E** for a sample five-year plan.

D. MSUJAP will deliver one information and orientation session at each NACM annual conference in advance of the formal start of the conference and during a time that does not conflict with other sessions that would be desired by potential MSU students, (i.e., first time attendee sessions; new career professional information sessions, plenary and breakout sessions). *Note:* MSUJAP information and orientation session could become

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<sup>1</sup> The Judicial Administration Program is in the School of Criminal Justice.

part of one of the aforementioned NACM sessions if deemed appropriate by both NACM and MSUJAP and advertised as such.

E. Student attendance is required at all designated and identified course sessions. Failure to meet the attendance requirements will result in a student losing credit for the course. See **Appendix F** for the course attendance form.

F. An MSUJAP representative attends all sessions that comprise the certificate courses. The representative makes all announcements related to the certificate program, collects all forms, monitors attendance, and conducts onsite course evaluation.

G. Students must pay MSU for the course following the instructions on the course payment form. See **Appendix G** for the course payment form.

H. MSUJAP is responsible for all student records and maintains the student database.

I. MSUJAP generates all certificates and is responsible for obtaining all signatures.

J. All courses are evaluated utilizing an objective-based evaluation method. See **Appendix H** for a sample evaluation form.

K. MSUJAP coordinates the development and delivery of the MSU certificate courses with NACM. NACM chooses with whom MSUJAP will coordinate so that the policies and procedures of the NACM conference are met.

L. MSUJAP announces the NACM partnership so that students are aware of the opportunities through NACM.

M. MSUJAP follows all timelines of NACM related to its conference planning so that the certificate program courses can be approved and announced to increase attendance at the conference and course sessions.

N. MSUJAP and NACM hold a graduation ceremony at the annual conference recognizing those students who completed the certificate through NACM. See **Appendix I** for a sample graduation program.

O. MSUJAP is responsible for audio visual costs and room rental, if required, for sessions.

P. MSUJAP in collaboration with NACM selects instructors that are qualified to teach the certificate courses. All instructors are subject to NACM's policies and procedures.

Q. Course instructors and MSUJAP collaborate to insure that the course approval form process is completed.

R. All instructor materials for the MSUJAP courses are made available in compliance with NACM's policies on conference materials.

#### **IV. NACM Responsibilities for the MSU Judicial Administration Certificate Program Courses Offered Through NACM**

A. NACM adds the MSU certificate program courses to its conference agenda with the hours required for each course being offered. Each MSU course session is designated on the NACM conference agenda as “MSU.” The courses are scheduled so as not to conflict with sessions that are likely to be attended by the majority of the certificate program students. (i. e. plenary and breakout sessions, etc.)

B. NACM secures the classroom and audio-visual equipment for the course sessions.

C.

D. NACM and MSUJAP coordinate to insure that the course approvals are met so that MSU can give credit for the course and develop the associated forms.

E. NACM and MSUJAP agree to a timeline for review and advertising of the course offerings.

F.

G. NACM advertises the partnership and certificate courses on its website and through its conference development materials.

H

I. NACM hosts a NACM/MSUJAP Certificate graduation ceremony during the annual conference.



## **Appendix A. Sample Certificate**

***National Association for Court Management  
Michigan State University Judicial Administration Program***

acknowledge that



***Julie R. Nelson***

successfully completed the required curriculum of study and is hereby awarded this certificate of completion in

***Judicial Administration***

July 21<sup>st</sup>, 2015

**NACM Core Competency Curriculum  
Guidelines**

*Caseflow Management*

*Information Technology Management*

*Human Resources Management*

*Leadership*

*Purposes and Responsibilities of Courts*

*Resources, Budget, and Finance*

*Court and Community Communication*

*Education, Training, and Development*

*Essential Components of Courts*

*Visioning and Strategic Planning*

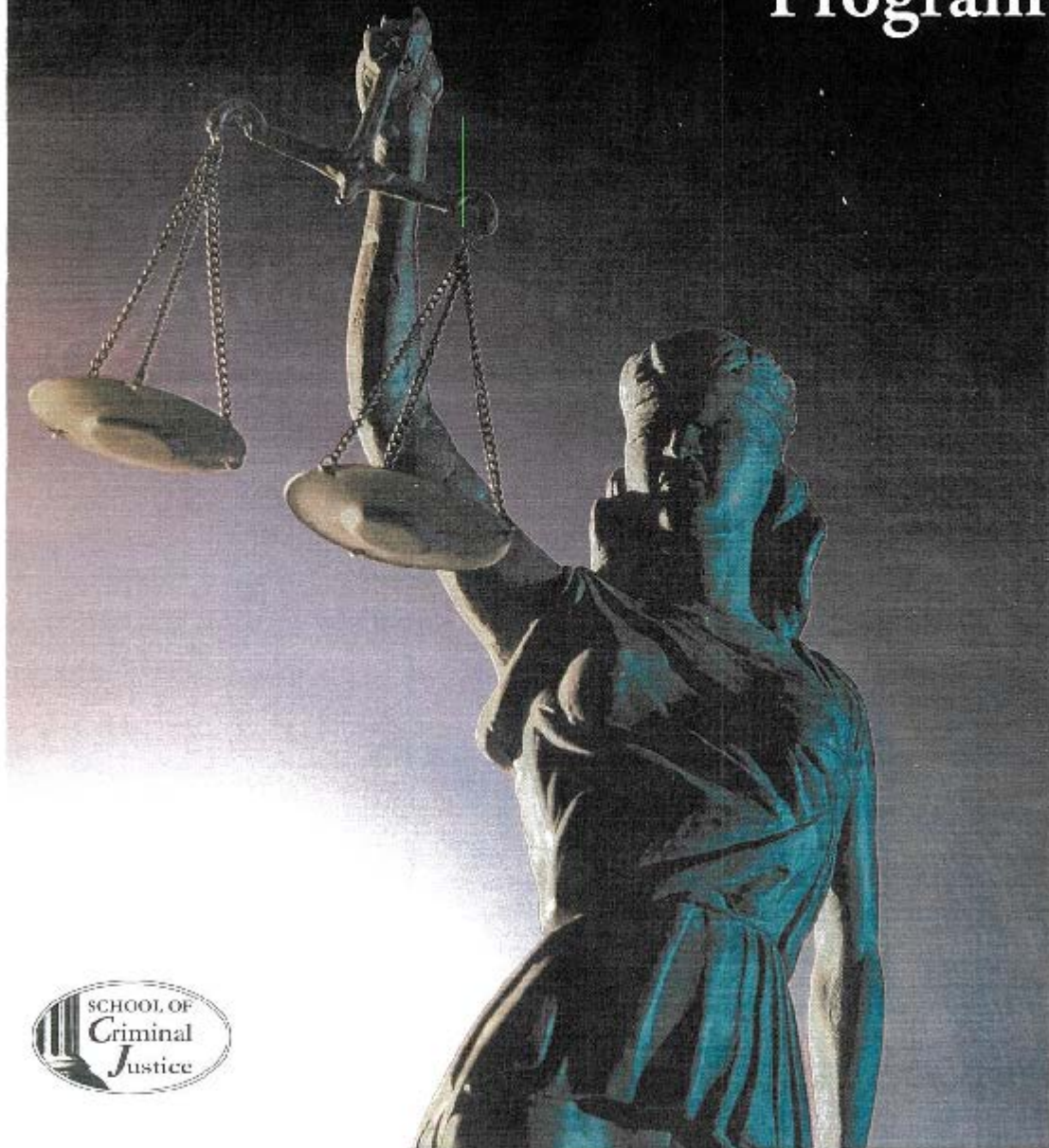
***Dr. Mary A. Finn***  
Director and Professor, MSU School of Criminal Justice

***Dr. Maureen E. Conner***  
Director, MSU Judicial Administration Program

***Stephanie Hess***  
President, National Association for Court Management

**Appendix B. Judicial Administration Program Brochure**

# Judicial Administration Program



The Judicial Administration Program at Michigan State University (MSU) is a community of learners, scholars, practitioners, and organizations dedicated to the advancement of the missions, mandates, and purposes of judicial systems across the globe through expert management and timeless leadership principles and practices.

Our goal is to bring academic rigor and standing to judicial administration through a comprehensive curriculum that offers both certificate programs and a Master of Science in Judicial Administration; research and publications; information collection and dissemination; and mentoring and networking opportunities. The profession of judicial administration achieves greater recognition and prestige through these credentialing mechanisms, which are made possible through MSU in partnership with local, state, national, federal, and international judicial branch education providers; state and federal court systems; professional court-related associations; and colleges and universities.

The MSU School of Criminal Justice is proud to offer the Judicial Administration Program and recognizes that multiple educational options are available for judicial system professionals and the organizations that serve their education and training needs as well as for those who aspire to have a career in local, state, federal, or international judicial systems. This program allows prospective students to determine which level of credentialing fits their academic interests and career goals, keeping in mind that each level can be a stepping stone to the next: noncredit certificate, credit-bearing certificate, and Master of Science in Judicial Administration. Each educational opportunity has a foundation in the ten core competencies created by the National Association for Court Management (NACM) and can be completed via live or online courses.

## Academic Programs

### Noncredit Certificate

This program is the first of its kind. It allows students an opportunity to gain academic credentials through participating in MSU online courses or those offered by MSU partner-providers. The Judicial Administration Program is designed to allow students to “start where they are” and build upon their existing professional skills and credentials all the way to an academic degree. Students may start and stop with the noncredit certificate, or students can complete the noncredit certificate and apply it toward credit-bearing courses that can culminate in either a bachelor’s or master’s degree.

**Objective:** To build a solid foundation of basic knowledge and skills in judicial administration that can be readily applied in the court environment.

**Who should enroll:** There are three primary audiences—individuals who are working in the courts or want to work in the courts and aspire to achieve positions of management and leadership and individuals who have come to the courts with expert knowledge from other professions and want to learn the foundations of judicial administration.

## Graduate Certificate

If students would like to earn a bachelor's degree, or they are working professionals with a bachelor's degree interested in earning a master's degree, they are ideal candidates for this graduate certificate. This credit-bearing certificate can also stand on its own as a graduate certificate, which allows individuals the opportunity to explore and deepen their knowledge and practice of judicial administration without enrolling in a degree-granting program.

**Objective:** To add to the basic knowledge and skills of judicial administration by integrating theory and practice from multiple disciplines that will challenge students to develop complex reasoning and critical thinking, broaden their exposure to multiple approaches and methods to managing and leading the courts, and deepen their understanding of the role of the courts in society.

**Who should enroll:** Individuals who want to apply the twelve graduate credits toward either a bachelor's or master's degree. Or, individuals who would like to experience a broader treatment of the subject matter without enrolling in a degree-granting program.

## Master of Science in Judicial Administration

If students have a bachelor's degree or any other advanced degree, they may apply directly to the Master's Degree Program or do so while they are in the credit-bearing certificate program

**Objective:** To build the academic credentials of the student through graduate education that specializes in judicial administration and blends theory and practice from other disciplines, thus allowing the student to master complex issues in judicial administration.

**Who should enroll:** Individuals desiring a master's degree and a career in judicial administration.

## Opportunities and Benefits for Students

**Building Block** – Start where you are and build upon your professional skills to advance your career through new educational credentials.

**Convenience** – Study when and where it suits you and your busy personal and professional life.

**Bridge** – Join a community focused on helping you throughout your career via mentoring, networking, and timely information sharing.

**Exposure** – Meet and network with other judicial personnel and judges who share your passion for the mission and mandates of the courts.

## **Partner-Provider Network**

If your organization is either offering or wants to offer education and training to judges and/or court personnel on judicial administration subject matter, you can join with MSU and become a partner-provider in delivering curriculum-based courses that can result in a certificate and/or academic credits for your participants.

Participation is easy. The Judicial Administration Program can approve your programs utilizing contact hours and content requirements or you can offer online learning opportunities by enrolling your audiences in the online MSU courses. If you prefer a blend of traditional live courses and online courses, that can also be accomplished through this program.

When you become a partner-provider, MSU will market your organization's programs through the network of partner-providers. Through this network, your organization will gain a ready-made curriculum and certificate program that is anchored in the NACM core competencies and more. Equally important is that your organization will be able to extend academic credit for your participants who want a college education.

## **Opportunities and Benefits for Partners**

**Make an Academic Affiliation** – Join a community of organizations that are affiliating with MSU to extend academic credit to their employees, members, or constituents who enroll in their court-related education and training programs.

**Gain a Comprehensive Curriculum** – Add value to your education and training programs by delivering curriculum-based courses specializing in judicial administration subject matter.

**Launch a Certificate Program** – Participate in a certificate program that can stand on its own or be applied toward academic courses in a credit-bearing certificate, undergraduate degree, or a Master of Science in Judicial Administration.

**Engage in Blended Learning** – Launch a blended learning program that includes traditional live programs and online courses offered by MSU.

**Offer Online Education** – Engage in a fully online judicial administration certificate program.

**Utilize Core Competencies** – Encourage the apprehension and application of the knowledge, skills, and abilities found within the NACM core competencies and more.

## Noncredit Certificate Requirements

**Prerequisites:** None

**Course Requirements:** The noncredit certificate is comprised of sixty contact hours of instruction plus a capstone experience based on the NACM core competencies. Successful completion is possible when students take courses in the following subject matter within five years from their start date.

**Core:** Forty contact hours with a minimum of six contact hours in each of the following:

- Caseflow Management
- Information Technology Management
- Human Resources Management
- Leadership
- Purposes and Responsibilities of Courts
- Resources, Budget, and Finance

**Elective:** Twenty contact hours in at least three of the following:

- Court and Community Communication
- Education, Training, and Development
- Essential Components of Courts
- Visioning and Strategic Planning

**Capstone:** Written assignment and one-on-one conversations with a supervising MSU faculty member

**Moving the Noncredit Certificate Forward:** Students who successfully complete the noncredit certificate can apply the certificate toward credit-bearing courses by adding thirty online contact hours with a MSU faculty member to their noncredit certificate, thus earning six graduate credits (CJ 860 and 864) that can be applied toward the graduate certificate or directly to the Master of Science in Judicial Administration. They may also transfer those credits to another academic institution and apply them toward a bachelor's or master's degree, if approved by the academic institution.

**Cost of Noncredit Certificate Over Five Years:\***

- \$20 nonrefundable application fee
- \$720 for the required 60 contact hours (\$12 per contact hour)
- \$60 for the capstone experience

**\*Costs are subject to change without notice**

**For More Information:** Visit us on the Web at <http://cj.msu.edu/programs/judicial-administration-program/> or

contact the Judicial Administration Program:

Dr. Maureen E. Conner, Director, [connerm@msu.edu](mailto:connerm@msu.edu)

Catharine M. White, Course and Student Administrator, [gamperca@msu.edu](mailto:gamperca@msu.edu)

Phone: 517.432.1716 Fax: 517.432.3965

## Graduate Certificate Requirements

**Prerequisites:** None

**Course Requirements:** Students must complete twelve graduate credits within six years of their first course. They may choose courses from the School of Criminal Justice and/or the Department of Political Science, which are listed below. The judicial administration sections of the criminal justice courses concentrate on management and leadership. The political science courses focus on policy analysis. Students are encouraged to select any combination of the courses to meet their career goals.

- CJ 864 Issues in Criminal Justice: Elements of Essential Court Operations
- CJ 829 Trends: National and Global Trends in Court Planning
- CJ 812 Criminal Justice Management Seminar: Preparing to Lead: Analyzing and Developing Organization and Personal Leadership
- CJ 860 Seminar in Management Topics Historical Foundations/Contemporary Frameworks of Judicial Administration

**Moving the Graduate Certificate Forward:** After completing the graduate certificate, students may transfer their credits to another university or apply them toward the Master of Science in Judicial Administration.

**Application and Tuition:**

- \$20 nonrefundable application fee
- In-state tuition is \$8,061.00 for twelve graduate credits (\$2,015.25 per three credit course for lifelong education in-state students)
- Out-of-state tuition is \$10,329.00 for twelve graduate credits (\$2,582.25 per three credit course for lifelong education out-of-state students)

**\*Costs are subject to change without notice**

**For More Information:** Visit us on the Web at <http://cj.msu.edu/programs/judicial-administration-program/>

or contact the Judicial Administration Program:

Dr. Maureen E. Conner, Director, [connerm@msu.edu](mailto:connerm@msu.edu)

Catharine M. White, Course and Student Administrator, [gamperca@msu.edu](mailto:gamperca@msu.edu)

Phone: 517.432.1716 Fax: 517.432.3965



## MASTER OF SCIENCE DEGREE IN JUDICIAL ADMINISTRATION

### Admission

To be considered for admission to the Master of Science degree program in Judicial Administration, an applicant must:

1. submit a personal statement regarding their academic and professional goals and work and professional experiences.
2. submit scores from a GRE general exam taken within the last five years. The GRE exam is waived for candidates with a cumulative undergraduate GPA of 3.2 or higher from an accredited and recognized college or university, and for applicants with a completed graduate degree.

The School of Criminal Justice recognizes that many applicants have been out of the academic environment for some time, and other factors may be considered in the admission process. A limited number of applicants who do not satisfy the School's regular admission requirements may be admitted on a provisional basis. The decision to grant provisional admission is based on the student's potential contributions to the field of judicial system administration. A student may be enrolled on a provisional basis for only two semesters and must be admitted on a regular basis to be considered a degree candidate. To qualify for regular status, a student must complete a minimum of 12 credits of graduate course work in criminal justice with a GPA of 3.0 or higher.

### Requirements for the Master of Science Degree in Judicial Administration: 30 credits

#### Core Foundation Courses: 15

Course Number	Title	Credits
CJ 812	Criminal Justice Management Seminar: Preparing to Lead: Analyzing and Developing Organization and Personal Leadership	3
CJ 829	National and Global Trends in Court Planning	3
CJ 860	Historical Foundations/Contemporary Frameworks in Judicial Administration	3
CJ 861	Budget Planning and Resource Allocation for Court Performance	3
CJ 862	Workforce Planning and Management in the Courts	3

#### Core Research Methods Courses: 6 credits required

Course Number	Title	Credits
CJ 811	Design and Analysis in Criminal Justice Research	3
CJ 887	Quantitative Methods in Criminal Justice Research	3

**Approved Electives: 6 credits required**

<b>Course Number</b>	<b>Title</b>	<b>Credits</b>
JRN 892	Special Topics: Courts in the Media	3
CJ 863	Courthouse Planning: Space, Technology, Security, and Disaster Recovery	3
CJ 864	Elements of Essential Court Operations	3
Approved Elective	By approval of academic advisor	3

**Plan B Policy Paper: 3 credits required**

<b>Course Number</b>	<b>Title</b>	<b>Credits</b>
CJ 896	Policy Analysis under Conditions of Change (Plan B Policy Paper)	3

**Location.** The Master of Science Degree in Judicial Administration will be offered only as an online program taught over the internet.

## Partner-Provider Network Requirements

**Organizations Can:** Use the judicial administration curriculum and courses or design their own that includes sixty contact hours in the following courses all of which are based on the NACM core competencies:

**Core:** Forty contact hours with a minimum of six contact hours in each of the following:

- Caseflow Management
- Information Technology Management
- Human Resources Management
- Leadership
- Purposes and Responsibilities of Courts
- Resources, Budget, and Finance

**Elective:** Twenty contact hours in at least three of the following:

- Court and Community Communication
- Education, Training, and Development
- Essential Components of Courts
- Visioning and Strategic Planning

### Participation Verification:

- Submit course objectives, descriptions, faculty biographies, and materials for approval prior to the course offering
- Monitor attendance via attendance sheets
- Provide information about the judicial administration program approved courses in all announcements and materials prior to and during the course offering
- Offer all sixty contact hours within a five-year period or be part of a network of partner-providers that offer courses, thus allowing students to meet the five-year completion requirement early and/or from multiple partner-providers

### University-to-University Affiliation Benefits

**Universities and Colleges Can:** Add a twelve credit-hour, graduate-level specialization in judicial administration to existing public administration, criminal justice, law, and other degree areas by engaging in a collaborative agreement with MSU.

### Advantages:

- Offer specialized knowledge in judicial administration for a global marketplace that is increasingly relying on specific expert knowledge and skill
- Prepare students who wish to dedicate their lives to the advancement of the rule of law across the globe
- Meet the needs of international students desiring a career in the courts and legal systems in their own countries

**For More Information:** Visit us on the Web at <http://cj.msu.edu/programs/judicial-administration-program/> or contact the Judicial Administration Program: Dr. Maureen E. Conner, Director, [connerm@msu.edu](mailto:connerm@msu.edu)

Catharine M. White, Course and Student Administrator, [gamperca@msu.edu](mailto:gamperca@msu.edu)  
Phone: 517.432.1716 Fax: 517.432.3965

## Appendix C. Capstone Experience Project Instructions

### Michigan State University School of Criminal Justice Judicial Administration Program Noncredit Certificate *Capstone Experience*

The culmination of the Judicial Administration Program Noncredit Certificate is the *Capstone Experience*. Students are required to begin the *Capstone Experience* once they have completed the 60 course contact hours. Successful completion of the *Capstone Experience* will result in the student receiving the noncredit certificate.

Students are encouraged to utilize the MSU Writing Center website @ <http://writing.msu.edu/>

Please Note: Students considering applying their noncredit certificate toward credit-bearing courses at MSU should contact Cathy White ([gamperca@msu.edu](mailto:gamperca@msu.edu)) before embarking on the *Capstone Experience*.

### ***Capstone Experience Instructions***

Step One: Lodge *Capstone Experience* request with Cathy White. Cathy White will verify eligibility to take the *Capstone Experience* and discuss options for moving the noncredit certificate toward credit-bearing courses at MSU and the impact that decision would have on the nature and length of the *Capstone Experience*.

Step Two: Student will pay the \$60.00 *Capstone Experience* fee.

Step Three: Student will submit a one page proposal with 1.5 spacing to Cathy White for review and acceptance. Submissions must include student name, contact information, and date. This information should appear single-spaced in the upper right hand corner of the page. **The proposal must be in Microsoft Word.** The proposal, as well as the final paper, should address the following issues and be organized by sections using the section headings identified below.

- **Description of Project:** This section will provide an overview of the project, rationale as to why this project was selected, and outline the course of action. The project must be related to judicial administration.
- **Statement of Problem:** This section will clearly state the issue, problem, challenge, opportunity, or question the student is addressing.

- **Method:** This section will describe how the student will approach the project.
- **Use of Judicial Administration Program Courses:** This section will identify the Judicial Administration Program course information that will be used for the project. If students are not using all ten courses, they must explain why the course(s) is not applicable.
- **Evaluation Criteria:** This section will describe how the student will know if they have been successful in addressing their judicial administration issue, problem, challenge, opportunity, or question.
- **Results and Conclusions:** This section will address what the student found that supports the student's conclusions and any applicable recommendations.
  - For the proposal, students should hypothesize what the result might be given all available information at the time the proposal is submitted.
  - For the final project paper submission, the student should address whether the hypothesis was supported and why or why not the results differed from the initial hypotheses set forth in the proposal.
- **Submission Deadline:** The student will set the deadline date for submission of the completed project.

**Step Four:** Cathy White will submit the proposal to an MSU faculty member for review and approval. Once approval is granted, the student will be contacted by the faculty member so that the student can begin work on the project. At this time, all ten (10) online Judicial Administration Program noncredit courses will be made available to the student to be used during the project. This folder will contain resources to assist the student toward successful completion of the project.

**Step Five:** Student will submit the paper to Cathy White by the deadline date. Students needing guidance on their paper should contact Cathy White.

- **Submission Format:** The student will adhere to the following paper submission guidelines:
  - The paper shall be no more than ten (10) pages long, 1.5 line-spacing. Microsoft Word is preferred; however, WordPerfect will be accepted.
  - Include a cover page with student name, contact information, date, and *Capstone Experience* clearly typed near the top or center. The title of the paper should appear directly below the words *Capstone*

*Experience.* The cover page is not included in the overall ten (10) page expectation.

- The content of the paper must be organized by the same section headings used in the proposal (*Description of Project, Statement of Problem, Method, Use of Judicial Administration Program Courses, Evaluation Criteria, and Results and Conclusions*). The student must use all of the headings identified above. However, the student may include more headings in addition to subheadings if deemed necessary.
- Include a reference list of the primary source material used to complete the project that includes the Judicial Administration Program course material and any other outside sources the student chooses to use. The reference list is also not included in the overall ten (10) page expectation. Citations and references should follow the *Chicago Manual of Style*.

Step Six: Review of the paper, comments, suggestions, and the like will be returned no later than thirty days following the submission of the paper.

Step Seven: Student will receive written notification of completion of the Judicial Administration Program Noncredit Certificate.

Step Eight: Students will receive certificate.

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Please contact Cathy White with any questions.

Cathy White  
Judicial Administration Program  
School of Criminal Justice  
Michigan State University  
1407 South Harrison Rd. Suite 330 Nisbet  
East Lansing, MI 48823-5239

Email: [gamperca@msu.edu](mailto:gamperca@msu.edu)

Telephone: 517.432.1716

Fax: 517.432.3965

Website: <http://cj.msu.edu/programs/judicial-administration-program/>

## EXAMPLES OF CHICAGO-STYLE DOCUMENTATION

For this project we will utilize the Chicago-style for citation of sources. The citation methods found in The Chicago Manual of Style, 14<sup>th</sup> Edition or higher are required for the *Capstone Experience*. If you are not acquainted with this citation style, please refer to the following examples and comments when preparing your work. Please note that we will utilize the **author-date** system for this course.

For additional information visit The Chicago Manual of Style official web site at [http://www.chicagomanualofstyle.org/tools\\_citationguide.html](http://www.chicagomanualofstyle.org/tools_citationguide.html)

### **Books**

#### *Book with one author*

Reference:

Doniger, Wendy. 1999. *Splitting the difference*. Chicago: University of Chicago Press.

In- Text:

(Doniger 1999, 254)

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#### *Book with two authors*

Reference:

Cowlshaw, Guy, and Robin Dunbar. 2000. *Primate conservation biology*. Chicago: University of Chicago Press.

In- Text:

(Cowlshaw and Dunbar 2000, 334)

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*Book with more than three authors*

Reference:

Laumann, Edward O., John H. Gagnon, Robert T. Michael, and Stuart Michaels. 1994. *The social organization of sexuality: Sexual practices in the United States*. Chicago: University of Chicago Press.

In- Text:

(Laumann et al. 1994, 281)

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*Edited book with 2 authors*

Reference:

Flinders, David J. and Geoffrey E. Mills, eds. 1993. *Theory and concepts in qualitative research: perspectives from the field*. New York: Teachers College Press.

In- Text:

(Flinders and Mills 1993, 21)

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*Preface, foreword, introduction, and similar parts of a book*

Reference:

Rieger, James. 1974. Introduction to *Frankenstein, or The modern Prometheus*, by Mary Wollstonecraft Shelley. Chicago: University of Chicago Press.

In- Text:

(Rieger 1974, 221)

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### *Chapter or other part of a book*

Reference:

Twaddell, W. Freeman. 1957. A note on Old High German umlaut. In *Readings in linguistics I: The development of descriptive linguistics in America, 1925–1956*. 4th ed. Edited by Martin Joos. Chicago: University of Chicago Press.

In- Text:

(Twaddell 1957, 85–87)

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### **Journals**

#### *Journal article with one author*

Reference:

Terborgh, J. 1974. Preservation of natural diversity: The problem of extinction-prone species. *BioScience* 24(2):715-22.

In- Text:

(Terborgh 1974, 720)

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#### *Journal article with two authors*

Reference:

Bolzan, J.F. and K.C. Jezek. 2000. Accumulation rate changes in central Greenland from passive microwave data. *Polar Geography* 27(4): 277-319.

In- Text:

(Bolzan and Jezek 2000, 280)

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### **Website**

Reference:

Roach, John. 2005. Journal Ranks Top 25 Unanswered Science Questions.  
<http://news.nationalgeographic.com> (accessed July 7, 2005).

In- Text:

(National Geographic 2005)

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### **Article from an electronic journal**

Reference:

Thomas, Trevor M. 1956. Wales: Land of Mines and Quarries. *Geographical Review* 46,  
no. 1: 59-81. <http://www.jstor.org/> (accessed June 30, 2005).

In- Text:

(Thomas 1956)

---

### **Newspaper article**

Reference:

Do not include in References. Citation is only made in running text style as demonstrated below.

In- Text:

"In an article on rampage killers (*New York Times*, April 10, 2000), Laurie Goodstein and William Glaberson describe..."

---

### **Notes:**

Your bibliography should document all the works you consulted in preparing your work, whether you cited them directly, or not.

Entries should be listed alphabetically by the first author's last name or family. If there is no named author, list by the first word in the work's title, ignoring 'A', 'An' or 'The'.

If the entry consists of more than one line of text, the following lines of that entry are indented by two spaces.

Catharine White  
1407 South Harrison  
Suite 330 Nisbet Building  
East Lansing, MI 48823-5239  
517/432-1716  
[gamperca@msu.edu](mailto:gamperca@msu.edu)  
April 19, 2007

## **Proposal**

**Description of Project**

**Statement of Problem**

**Method**

**Use of Judicial Administration Program Courses**

**Evaluation Criteria**

**Results and Conclusions**

### **Reminder**

*\*Use 1.5 line-spacing*

*\*Proposal limited to one (1) page*

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April 19, 2007

*Capstone Experience*

Working with Octogenarians in Elder Courts: A Case-Study of Optimism and Hope

**Reminder**

*\*This page is not included in the 10 page count requirement*

## **Working with Octogenarians in Elder Courts: A Case-Study of Optimism and Hope**

### **Description of Project**

### **Statement of Problem**

### **Method**

### **Use of Judicial Administration Program Courses**

### **Evaluation Criteria**

### **Results and Conclusions**

#### **Reminder**

*\*The 10 page requirement will be comprised of your material organized by the headings.*

*\*Use 1.5 line-spacing*

## References

### **Reminder**

*\*This page is not included in the 10 page count requirement  
\*Use Chicago Manual of Style for citation format.*



## Appendix D. Sample Course Approval Form

### Course Approval Application Instructions for Judicial Administration Noncredit Certificate Program Michigan State University

**Organization Contact Information.** Provide all requested information so that we can directly communicate with the individual completing the application.

**Core or Elective Subject Matter Course Requirements.** Indicate which subject matter your course will fulfill for Judicial Administration's core or elective subject matter requirements. The subject matter includes the knowledge, skills, and abilities (KSAs) developed by the National Association for Court Management (NACM) core competencies.

It is important to follow the guidelines with regards to content sessions; the guidelines are as follows: Students must complete sixty (60) contact hours and an internet-based capstone experience covering the subject matter based on the National Association for Court Management (NACM) core competencies.

**Required core courses** are Caseflow Management; Information Technology Management; Human Resources Management; Leadership; Purposes and Responsibilities of Courts; Resources, Budget and Finance. Students must complete forty (40) contact hours with at least six (6) contact hours in each core course.

**Required elective courses** are Court and Community Communication; Education, Training, and Development; Essential Components of the Courts; and Visioning and Strategic Planning. Students must complete twenty (20) contact hours in at least three (3) of the elective courses. Students will be able to complete the noncredit certificate through courses offered by participating local, state, national, and federal organizations; and/or MSU Judicial Administration Program internet courses.

Students must complete the noncredit certificate five years from the date they first enroll in a course.

**Course Information.** Provide the course name, the dates it starts and ends, and the location where it is being taught. It is important that your course description, goals and learner objectives meet the requirements as described by NACM Core Competencies which are listed under *"Course Content Guidelines."* This will be determined based on your descriptions and the information you attach to your application. Learning objectives are measurable statements about what the student will know or be able to do as a result of your course. Indicate the target audience you wish to attract and the number of contact hours. Be sure to provide faculty contact information in case there are questions.

If teaching this course at conferences other than the one listed in this application, or if the course content changes from what is submitted, please contact Cathy White ([gamperca@msu.edu](mailto:gamperca@msu.edu)).

**Attachments.** Besides the completed application form, required documents at the time of application include: course syllabus and/or agenda, faculty biographic information. Teaching materials or outline and the learning activities are optional, but may be required if more information is needed to assess whether the course qualifies. All course/session learning materials should be submitted to JA when the course/session is completed.

**Student Attendance Forms** (after course completion). The Organization will submit student attendance forms immediately after completion of the course. Students will not receive credit until the attendance forms are submitted. Attendance forms will be maintained by the Judicial Administration Program for recordkeeping and audit purposes.

**Submit application and attachments to:**

Cathy White  
Judicial Administration  
School of Criminal Justice  
Michigan State University  
1407 South Harrison  
Suite 330 Nisbet Building  
East Lansing, MI 48823-5239

Telephone: 517.432.1719  
Email: [gamperca@msu.edu](mailto:gamperca@msu.edu)

**Application for Course Approval  
Judicial Administration Noncredit Certificate Program  
Michigan State University**

Before completing this application, read instructions. Print clearly in ink or type.

**Organization Contact Information**

Name of organization	_____
Contact person (completing form)	_____
Address (number, street, suite)	_____
(city, state, zip code)	_____
Phone Number (include area code)	_____
Fax Number (include area code)	_____
Email address	_____
Organization's Website Address	_____

**Core or Elective Subject Matter Course Requirements**

<p><b>Check which Judicial Administration core or elective subject matter this course attempts to fulfill:</b></p> <p><b>Required Core Courses</b> Note: The minimum requirement of six (6) contact hours offered through one (1) program must be met before the core course can be eligible for the Judicial Administration Program.</p> <p>____ Caseflow Management ____ Information Technology Management ____ Human Resources Management ____ Leadership ____ Purposes and Responsibilities of Courts ____ Resources, Budget, and Finance</p> <p><b>Required Elective Courses</b> Note: There is no contact hour requirement for an elective subject matter; however, students must complete as least three (3) of the elective courses for a total of twenty (20) contact hours.</p> <p>____ Court and Community Communication ____ Education, Training, and Development ____ Essential Components of Courts ____ Visioning and Strategic Planning</p>
---

**Course Information**

Course/session name \_\_\_\_\_

Course/session start and end dates \_\_\_\_\_

Course/session location (city & state) \_\_\_\_\_

**Describe the course and/or course sessions for which you are requesting approval:**

**List learning objectives** (measurable statements about what the student will know or be able to do as a result of their participation):

**Target audience includes:**

**Number of contact hours\*** \_\_\_\_\_

\*Contact hours can only be granted for participation in content sessions that will enhance knowledge, skills and/or activities. Only sessions in which the student is required to attend the entire time allotment and participates in learning should be included. Credit cannot be granted for business meetings/governance meetings, breaks, or social activities including meal functions; however, exceptions may be granted for actual time of a content speaker (i.e. working lunch with a content speaker).

**Names of faculty members** (provide contact information such as complete name, complete address, telephone, and email address):

**Attach the following items when submitting this course approval form:**

Course syllabus and/or agenda (required)

Faculty biographic information (required)

Teaching materials or outline (optional, but may be required if more information is needed to assess whether the course qualifies)

Learning activities (optional, but may be required if more information is needed to assess whether the course qualifies)

Office Use: Status of Application: (Approval/Date) \_\_\_\_\_

6.25.05; 3.6.08

## Appendix E. Sample Five-Year Plan

### NACM Five-Year Plan 2010-2014

	2010 Annual	2011 Annual	2012 Annual	2013 Annual	2014 Annual	Total Contact Hours
Course #1	Information Technology Management (6)	Resources, Budget, and Finance (7)	Leadership (6)	Purposes and Responsibilities of Courts (6)	Caseflow Management (8)	33
Course #2	Visioning and Strategic Planning (5)	Court and Community Communication (5)	Essential Components of Courts (5)	Human Resources Management (7)	Education, Training, and Development (5)	27
Total Contact Hours	11	12	11	13	13	60

The noncredit certificate is comprised of sixty (60) contact hours of instruction plus a capstone experience based on the NACM core competencies. Successful completion is possible when students take courses in the following subject matter within five (5) years from their start date.

**Core Courses (Forty Contact Hours with a Minimum of Six Contact Hours in Each):**

- ✓ Caseflow Management
- ✓ Information Technology Management
- ✓ Human Resources Management
- ✓ Leadership
- ✓ Purposes and Responsibilities of Courts
- ✓ Resources, Budget, and Finance

**Elective (Twenty Contact Hours in at Least Three of the Following):**

- ✓ Court and Community Communication
- ✓ Education, Training, and Development
- ✓ Essential Components of Courts
- ✓ Visioning and Strategic Planning

**Note:** The five-year plan presented above adheres to the request to offer MSU JA courses at annual and not midyear conferences and is derived, in part, from the specific ordering or offering of courses from the first five-year cycle.



## Appendix F. Sample Course Attendance Form

### Student Attendance Form:

**Judicial Administration Noncredit Certificate Program  
School of Criminal Justice - Michigan State University**

**Complete this form and submit to the attendance monitor at the end of the last course session with your evaluation. All sessions listed are required. Please indicate below if the following student contact information has changed since your last attendance form submission.**

**Contact Information: Please Print**

**Name** \_\_\_\_\_

**Address (number, street, suite)** \_\_\_\_\_

**(city, state, zip code)** \_\_\_\_\_

**Phone Number (include area code)** \_\_\_\_\_

**Fax Number (include area code)** \_\_\_\_\_

**Email address** \_\_\_\_\_

**Judicial Admin. Number** \_\_\_\_\_ (this is assigned when we receive your JA  
Program application)

**Position Title** \_\_\_\_\_

**Court Affiliation** \_\_\_\_\_

<b>Sponsoring Organization:</b>	<b>Conference Location:</b>	<b>Dates:</b>
<b>Course Name:</b>	<b>Contact Hours for this Course:</b>	

<b>Session Name:</b> <b>Session Date:</b> <b>Faculty:</b> <b>Monitor's Signature</b> _____	<b>Session Name:</b> <b>Session Date:</b> <b>Faculty:</b> <b>Monitor's Signature</b> _____
---	---

By signing below, I certify that I participated in the sessions described in fulfillment of the requirements for the Judicial Administration Noncredit Certificate at Michigan State University.

---

Student Signature
Date

## Appendix G. Sample Course Payment Form

### ***Student Course Payment Form:***

Judicial Administration Noncredit Certificate Program  
School of Criminal Justice - Michigan State University

Complete this form and send to the address listed below with your payment (\$12 per contact hour) to have contact hours credited to your program. Please print or type. Please indicate below if the following student contact information has changed since your last payment form submission.

#### **Contact Information**

Student's Name \_\_\_\_\_  
Address (number, street, suite) \_\_\_\_\_  
(city, state, zip code) \_\_\_\_\_  
Email address \_\_\_\_\_  
Judicial Admin. Number \_\_\_\_\_

#### **Course Information**

Sponsoring Organization:  
Location:

Conference Dates:

In the appropriate space, provide the number of hours approved for this course:

##### **Required Core Courses**

☐ Caseflow Management ☐ Information Technology Management  
☐ Human Resources Management ☐ Leadership  
☐ Purposes and Responsibilities of Courts ☐ Resources, Budget, and Finance

##### **Required Elective Courses**

☐ Court and Community Communications ☐ Education, Training, and Development  
☐ Essential Components of Courts ☐ Visioning and Strategic Planning

By signing below, I certify that I participated in the course described and request      contact hours in fulfillment of the requirements for the Judicial Administration Noncredit Certificate Program at Michigan State University. I have enclosed   \$     for payment.  
(amount)

\_\_\_\_\_  
Student Signature

\_\_\_\_\_  
Date

#### **Send Form and Payment (\$12 per Contact Hour) to:**

Judicial Administration  
School of Criminal Justice  
Michigan State University  
1407 South Harrison  
Suite 330 Nisbet Building  
East Lansing, MI 48823-5239  
Telephone: 517.432.1716

## Appendix H. Sample Course Evaluation Form

### MICHIGAN STATE UNIVERSITY JUDICIAL ADMINISTRATION NONCREDIT PROGRAM COURSE EVALUATION

#### INSERT COURSE NAME

**Instructions:** In the spirit of continual quality improvement, please take a moment to respond to this evaluation regarding the sessions that comprised the **XXXXX** course for the Judicial Administration Program.

On a five-point scale (1 is the lowest and 5 is the highest), indicate the extent to which the course learning objectives were met. As a result of attending this course, participants will:

Learning objectives for: <b>XXXXX</b>	Low 1	2	3	4	High 5

Instructor's ( <b>XXXXX</b> ) skills for this course	Low 1	2	3	4	High 5
Indicate the level of knowledge the instructor exhibited related to the subject matter.					
Indicate the level of quality of the instructor's presentation skills.					

Course Utility	Low 1	2	3	4	High 5
Rate the overall usefulness of this course.					

Please offer any suggestions and/or comments regarding this course.

## Appendix I. Sample Graduation Program

Michigan State University (MSU)  
*Judicial Administration Program*  
 The Federal Court Clerks Association (FCCA)  
 National Conference of Bankruptcy Clerks (NCBC)

*Present the*

**2016 MSU/FCCA/NCBC Student Graduation Ceremony**

**Wednesday, August 10<sup>th</sup>, 2016 8:30 am ET- 9:45 am ET**  
**Washington DC**

**Association Remarks:** Mr. Thomas Bruton, *President and Program Graduate*  
*Federal Court Clerks Association*  
 Ms. M. Regina Thomas, *President*  
*National Conference of Bankruptcy Clerks*

**MSU Remarks:** Dr. Maureen Conner, *Director and Professor*  
*MSU Judicial Administration Program*

**Graduate Presentation:** Mr. Michael Palus, *FCCA/MSU Education Liaison and Program Graduate*  
*Federal Court Clerks Association*  
 Mr. Barry Lander, *NCBC/MSU Education Liaison*  
*National Conference of Bankruptcy Clerks*

**Certificate Bestowment & Receipt of Graduates:** Dr. Maureen Conner  
 Mr. Thomas Bruton  
 Ms. M. Regina Thomas

**2016 MSU/FCCA/NCBC Master of Science Degree in Judicial Administration Program & Master of Science Degree in Criminal Justice Judicial Administration Specialization Program Graduates**

Graduate	Policy Paper Title	
Terrence DeGrenier (AZD)	Unbalanced Justice	FCCA
Nicole Eallonardo (NYND) <i>*Unable to attend</i>	Rent on the Mend: The Disestablishment of the Federal Building Fund	FCCA
Keah Marsh (NCED) <i>*Unable to attend</i>	Preparing for the Next Generation of Public Servants: A Policy Paper on Recruiting, Engaging and Retaining Millennials in a Multigenerational Workforce	FCCA
Jason McDonald (TXEB)	Indigent Defense Reform: A National Initiative For Fair and Equal Justice Act (FEJA)	NCBC



### 2016 MSU/FCCA/NCBC Noncredit Certificate Program Graduates

Graduate	Capstone Experience Project Title	
Rugena Bivins (TNWB)	Transition (Retirement, Career After Retirement, AND Career Change)	NCBC
Sheri Brolick (MIWB)	The World is our Office: How Technology Has Changed Where and When We Work	NCBC
Gerri Lynn Brown (PAWB)	Succession Planning and Capturing Valuable Employee Knowledge Before It's Too Late	NCBC
Shenitha Burton (ILNB) <i>*Unable to attend</i>	Increasing the Accuracy Percentage of Electronic Filings that Populate a Court Calendar ( <i>FCLP Final Paper</i> )	NCBC
Jennifer Dias (RID)	The Pros and Cons of Telework in a Small District Court	FCCA
David Doyle (PAWB)	Employee Engagement and Why It Matters	NCBC
Joan Kurtz (FLND)	Juror Orientation Process – Needs Spring Cleaning!	FCCA
Marcella Lockert (INSB)	Morale in the Workplace	NCBC
Shane Luck (OHND)	Succession Planning and the Courts – Dealing with a Transitioning Workforce	FCCA
Alan Milot (NYEB)	Patch Management – The First Level of Judicial Security	NCBC
William Roper (CACD)	Principles of a Multigenerational Workforce: Impact on Judicial Administration and Management	FCCA
Evelyn Synagogue (CACD)	Mentoring Partnership	FCCA
Michael Wing (ILND)	The Need For Having A Community Outreach Program	FCCA

### Posthumous Acknowledgement of Noncredit Certificate Program Participation

Darryl McFadden (NYEB)	Received by Shirley Jenkins, <i>Human Resources Specialist</i>	NCBC
------------------------	--	------

*\* Graduates, association presidents, and liaisons are kindly asked to remain post-ceremony for pictures.*



**Committee Progress Report Form – 2017-2018**  
**Committee: Conference Development Committee**

	Report	Due Date	Submission Date
X	Fall Progress Report	September 5, 2017	September 5, 2017
	Midyear Progress Report	January 16, 2018	
	Annual Progress Report	June 20, 2018	

Project	Project Status	Strategic Priority? (Yes/No)	Discussion Needed? (Yes/No)	Board Action Needed? (Yes/No)	If Yes to discussion or action, please describe what needed
<b>February 11-14, Orange County, CA</b> Hyatt Regency Orange County 11999 Harbor Boulevard Garden Grove, CA 92840  <b>Theme: <i>Bridging the Gap: The Power of Strategic Collaboration</i></b>	<u>Timelines:</u> i. <a href="#">Call for proposals</a> due July 31, 2017; 69 received ii. Proposals sent to review panel – August 3, 2017 iii. Review panel submits scoring – August 15, 2017 iv. Final review of proposals – August 23, 2017 v. Draft Agenda due end of September <u>Conference length:</u> i. Change in length to 2 full days <u>Social/Fund raiser:</u> No formal social however looking at activity/event to sponsor fund raiser	N	N	N	

Project	Project Status	Strategic Priority? (Yes/No)	Discussion Needed? (Yes/No)	Board Action Needed? (Yes/No)	If Yes to discussion or action, please describe what needed
	Subcommittees: i. Midyear Education ii. Hosts iii. Shared Interest Groups (SIGs) iv. Social v. ECP Welcome reception Fund raiser				
<b>2018 Annual Conference</b>  July 22-26, Atlanta, GA Hilton Atlanta 255 Courtland St Atlanta, GA 30303  <b>Theme: TBD</b>	Subcommittees: i. Annual Education ii. First-time attendee iii. Hosts iv. Shared Interest Groups (SIGs) v. Social vi. ECP Welcome reception Fund raiser	<b>N</b>	<b>N</b>	<b>N</b>	

Time needed at meeting for Committee report: 10 minutes

Submitted by: Paul DeLosh, Chair  
Will Simmons, Vice chair

Date: 9/5/17



**Committee Progress Report Form – 2017-2018**

**Committee:** Finance Committee

	Report	Due Date	Submission Date
X	Fall Progress Report	September 5, 2017	September 5, 2017
	Midyear Progress Report	January 16, 2018	
	Annual Progress Report	June 20, 2018	

Project	Project Status	Strategic Priority? (Yes/No)	Discussion Needed? (Yes/No)	Board Action Needed? (Yes/No)	If Yes to discussion or action, please describe what needed
Financial Review of Investments	Ongoing. Wells Fargo Investment managers are now located in Williamsburg.	Y	N	N	
Grants/ Budget Management	Ongoing. TJ Bement is writing grants that will support NACM's education conference agendas.	Y	N	N	
2018 Budget	Paul, Will and TJ met in Williamsburg to create the 2018 NACM budget for approval	Y	Y	Y	Approval of 2018 Operating Budget

**Time needed at meeting for Committee report:**

**Submitted by:** Will Simmons, Chair & TJ Bement, Vice Chair

**Date:** September 5, 2017



**Committee Progress Report Form – 2017-2018**

**Committee:** State Associations

	Report	Due Date	Submission Date
X	Fall Progress Report	September 5, 2017	September 5, 2017
	Midyear Progress Report	January 16, 2018	
	Annual Progress Report	June 20, 2018	

Project	Project Status	Strategic Priority? (Yes/No)	Discussion Needed? (Yes/No)	Board Action Needed? (Yes/No)	If Yes to discussion or action, please describe what needed
Annual Leadership Seminar Recap	Discussion of the Leadership Retreat for assessment and improvement. Introduction of new state association leaders.	N	N	N	
Add "State Spotlight" to a NACM Publication	Highlight a state association or state program to share with the association membership for added value for state State Associations Committee.	N	N	N	
Recruitment	In an effort to increase participation the committee will ask 10 members to divide the state association's list to reach out to current state association presidents and invite them to the conference call. Doing so will also assist with updating the listserv.	N	N	N	

**Time needed at meeting for Committee report:**

**Submitted by: Will Simmons**

**Date: September 5, 2017**

### NACM Revenue/Expenses by Category

Governance Q1000.0000; Q4000.0000; Q4800.0000		
<b>REVENUE - GENERAL OPERATIONS</b>		
Donations	A405-02	Q1000.0000
In-Kind Contrib.-NCSC	A405-06	Q1000.0000
Scholarship Fd	A405-05	Q1000.0000 - Gallas scholarship
Interest Income	A410-01	Q1000.0000
Invest Gains/Losses	A415-01	Q1000.0000
Misc. Income	A495-01	Q1000.0000
Scholarships	A565-01	Q1000.0000 <b>PREVIOUSLY</b> Gallas
<b>EXPENSES - GENERAL OPERATIONS</b>		
Consultant	A500-01	Q1000.0000
Travel General	A510-00	Q1000.0000
Travel President	A510-01	Q1000.0000
Travel Officer	A510-04	Q1000.0000
Travel Site Visit	A510-06	Q1000.0000
Travel Jt. Tech Com	A510-07	Q1000.0000
Travel Assoc Svcs	A510-08	Q1000.0000
Pres Discretionary	A522-01	Q1000.0000
Committee Exp	A525-01	Q1000.0000
Telephone / Webinars	A530-01	Q1000.0000
Postage	A535-01	Q1000.0000
Print/Photocopy	A540-01	Q1000.0000
Office Supplies	A545-01	Q1000.0000
Credit Card Fees	A550-01	Q1000.0000
Licenses & Fees	A555-01	Q1000.0000
Liability/D&O Ins	A560-01	Q1000.0000
Scholarships	A565-01	Q1000.0000 Graduate, Gallas & ICM
Admin/Contract Fee	A575-01	Q1000.0000
Grant Match- Admin/Con	A577-07	Q1000.0000
Audit Fees/Tax Prep	A580-01	Q1000.0000
Other Expenses	A595-01	Q1000.0000
<b>EXPENSES - BOARD MTGS</b>		
Travel - General	A510-00	Q4000.0000
Food & Beverage	A518-01	Q4000.0000
Audio-Visual / Internet	A528-01	Q4000.0000
<b>REVENUE - SPECIAL PROJECT FUND (fundraising)</b>		
Donations/Other	A405-01	Q4800.0000
Scholarship Fund	A405-05	Q4800.0000
<b>EXPENSES</b>		
Expenses	A520-01	Q4800.0000
Scholarships	A565-01	Q4800.0000
<b>Total Governance</b>		

2017		
Budget Revenue	Budget Expenses	Budget Net
0.00		
90,000.00		90,000.00
1,500.00		1,500.00
0.00		0.00
0.00		0.00
		0.00
	0.00	0.00
	0.00	0.00
	20,000.00	-20,000.00
	1,500.00	-1,500.00
	4,000.00	-4,000.00
	0.00	0.00
	6,500.00	-6,500.00
	2,500.00	-2,500.00
	0.00	0.00
	8,500.00	-8,500.00
	300.00	-300.00
	500.00	-500.00
	200.00	-200.00
	15,000.00	-15,000.00
	45.00	-45.00
	5,500.00	-5,500.00
	3,000.00	-3,000.00
	369,463.00	-369,463.00
	65,351.00	-65,351.00
	1,500.00	-1,500.00
	0.00	0.00
91,500.00	503,859.00	-412,359.00
	43,000.00	-43,000.00
	9,000.00	-9,000.00
	1,000.00	-1,000.00
	53,000.00	-53,000.00
0.00		0.00
0.00		0.00
	0.00	0.00
	0.00	0.00
0.00	0.00	0.00
\$91,500.00	\$556,859.00	-\$465,359.00

2017		
Actual Revenue	Actual Expenses	Actual Net
67,500.00		67,500.00
1,500.00		1,500.00
5,205.60		5,205.60
55,457.31		55,457.31
0.00		0.00
0.00		0.00
	0.00	0.00
	0.00	0.00
	7,859.92	-7,859.92
	676.36	-676.36
	2,319.12	-2,319.12
	0.00	0.00
	5,165.12	-5,165.12
	499.92	-499.92
	727.57	-727.57
	2,932.42	-2,932.42
	234.70	-234.70
	333.88	-333.88
	0.00	0.00
	18,448.06	-18,448.06
	26.95	-26.95
	5,501.91	-5,501.91
	0.00	0.00
	277,097.22	-277,097.22
	49,013.28	-49,013.28
	0.00	0.00
	0.00	0.00
<u>129,662.91</u>	<u>370,836.43</u>	<u>-241,173.52</u>
	24,970.38	-24,970.38
	6,187.76	-6,187.76
	<u>1,761.60</u>	<u>-1,761.60</u>
	32,919.74	-32,919.74
0.00		0.00
8,804.54		8,804.54
	0.00	0.00
	<u>9,521.49</u>	<u>-9,521.49</u>
<u>8,804.54</u>	<u>9,521.49</u>	<u>-716.95</u>
\$138,467.45	\$413,277.66	-274,810.21

Conferences- Q2000 (Annual)

ANNUAL CONFERENCE	REVENUE

EXPENSES		
Consultant - Live Stream	A500-01	Q2000.6017 - SJI - Annual Conf. 2017
Travel - Gen.	A510-00	Q2000.1000- AC Education Q2000.2000- AC Planning Q2000.3000- AC Events Q2000.5000 - AC Leadership Q2000.6017 - SJI Ann. Conf. 2017
Honoraria	A514-01	Q2000.6017 - SJI Ann. Conf. 2017
Audio Visual/Internet	A516-01	Q2000.1000 - AC Education Q2000.2000 - AC Planning Q2000.4000 - AC Vendors Q2000.5000 - AC Leadership Q2000.6017 - SJI - Annual Conf. 2017
Food & Beverage	A518-01	Q2000.3000- AC Events Q2000.4000- AC Vendors Q2000.5000- AC Leadership
Conference Exps.	A520-01	Q2000.1000 - AC Education (ICM/MSU) Q2000.2000 - AC Planning Q2000.3000 - AC Events Q2000.4000 - AC Vendors Q2000.5000 - AC Leadership
Postage	A535-01	Q2000.1000- AC Education Q2000.2000- AC Planning
Printing/Photocopying	A540-01	Q2000.2000- AC Planning Q2000.3000 - AC Events Q2000.4000 - AC Vendors

2017		
Actual Revenue	Actual Expenses	Actual Net
0.00		0.00
438,435.12		438,435.12
13,610.00		13,610.00
182,800.00		182,800.00
5,833.00		5,833.00
54,800.00		54,800.00
69,139.88		69,139.88
<u>764,618.00</u>		<u>764,618.00</u>
	15,025.00	-15,025.00
	<u>15,025.00</u>	<u>-15,025.00</u>
	0.00	0.00
	4,709.08	-4,709.08
	19.14	-19.14
	0.00	0.00
	<u>4,896.88</u>	<u>-4,896.88</u>
	9,625.10	-9,625.10
	<u>18,750.00</u>	<u>-18,750.00</u>
	18,750.00	-18,750.00
	0.00	0.00
	0.00	0.00
	233.75	-233.75
	654.50	-654.50
	<u>41,643.00</u>	<u>-41,643.00</u>
	42,531.25	-42,531.25
	198,471.22	-198,471.22
	522.55	-522.55
	<u>220.42</u>	<u>-220.42</u>
	199,214.19	-199,214.19
	0.00	0.00
	11,837.29	-11,837.29
	172,686.42	-172,686.42
	8,168.27	-8,168.27
	<u>0.00</u>	<u>0.00</u>
	192,691.98	-192,691.98
	0.00	0.00
	<u>1,007.77</u>	<u>-1,007.77</u>
	1,007.77	-1,007.77
	2,276.00	-2,276.00
	0.00	0.00
	<u>0.00</u>	<u>0.00</u>
	2,276.00	-2,276.00



# NACM Revenue/Expenses by Category

## ANNUAL CONFERENCE

### EXPENSES (cont.)

Licenses & Fees	A555-01	Q2000.2000-AC Planning
Insurance Expense	A560-01	Q2000.2000- AC Planning
Scholarships	A565-01	Q2000.3000 - AC Events
Admin/Contract Fee	A575-01	Q2000.2000 - AC Planning
Grant Match - Consultant	A577-00	Q2000.2000 AC Planning
Grant Match- Travel	A577-01	Q2000.1000 AC Education
Grant Match - Honorariur	A577-02	Q2000.1000 AC Education
Grant Match - AV	A577-03	Q2000.1000 AC Education
Grant Match - Postage	A577-04	Q2000.2000 AC Planning
Grant Match-Admin/Cont	A577-07	Q2000.2000 - AC Planning
Awards	A585-02	Q2000.2000 AC Planning
President's Gift	A585-04	Q2000.2000 AC Planning

AC Expense Total  
Total Annual Conference

2017		
Budget Revenue	Budget Expenses	Budget Net
	125.00	-125.00
	2,000.00	-2,000.00
	0.00	0.00
	0.00	0.00
	0.00	0.00
	10,000.00	-10,000.00
	6,250.00	-6,250.00
	41,643.00	-41,643.00
	0.00	0.00
	0.00	0.00
	1,300.00	-1,300.00
	900.00	-900.00
	62,218.00	-62,218.00
	496,803.00	-496,803.00
\$717,818.00	\$496,803.00	\$221,015.00

2017		
Actual Revenue	Actual Expenses	Actual Net
	125.00	-125.00
	1,945.13	-1,945.13
	0.00	0.00
	0.00	0.00
	0.00	0.00
	2,560.36	-2,560.36
	7,378.34	-7,378.34
	51,897.86	-51,897.86
	0.00	0.00
	0.00	0.00
	699.69	-699.69
	792.56	-792.56
	65,398.94	-65,398.94
	546,520.23	-546,520.23
\$764,618.00	\$546,520.23	\$218,097.77

# NACM Revenue/Expenses by Category

Conferences- Q3000 (Midyear)		
MIDYEAR CONFERENCE		
REVENUE		
Fees & Registrations	A420-01	Q3000.3000- MC Events
		Q3000.4000 - MC Vendors
Social/Other Income	A425-01	Q3000.3000- MC Events
Vendor Income	A430-01	Q3000.4000 - MC Vendors
Sponsorship Income	A435-01	Q3000.4000 - MC Vendors
SJI Grant	A440-01	Q3000.6017 - Midyear Conf. 2017
		<b>MY Revenue Total</b>
EXPENSE		
Consultant - Live Stream	A500-01	Q3000.6017 -SJI Midyear Conf. 2017
Travel - Gen.	A510-00	Q3000.1000 - MC Education
		Q3000.2000- MC Planning
		Q3000.6017 -SJI Midyear Conf. 2017
Honoraria	A514-01	Q3000.6017 - SJI Midyear Conf. 2017
Audio Visual/Internet	A516-01	Q3000.1000 - MC Education
		Q3000.4000 - MC Vendors
		Q3000.6017 - SJI Midyear Conf. 2017
Food & Beverage	A518-01	Q3000.3000- MC Events
		Q3000.4000 - MC Vendors
Conference Exps.	A520-01	Q3000.2000 - MC Planning
		Q3000.3000 - MC Events
		Q3000.4000 - MC Vendors
Postage	A535-01	Q3000.2000-MC Planning
Printing/Photocopying	A540-01	Q3000.4000- MC Vendors
Insurance Expense	A560-01	Q3000.2000 - MC Planning
Admin/Contract Fee	A575-01	Q3000.2000 - MC Planning
Grant Match - Consultant	A577-00	Q3000.2000 MC Planning
Grant Match- Travel	A577-01	Q3000.1000 MC Education
Grant Match - Honorariur	A577-02	Q3000.1000 MC Education
Grant Match - AV	A577-03	Q3000.1000 MC Education
Grant Match - Postage	A577-04	Q3000.2000 MC Planning
Grant Match-Admin/Cont	A577-07	Q3000.2000 - MC Planning
Other Expenses	A595-01	Q3000.3000 - MC Events/Rental
		<b>MY Expense Total</b>
		<b>Total Midyear Conference</b>

2017		
Budget Revenue	Budget Expenses	Budget Net
61,800.00		61,800.00
300.00		300.00
55,000.00		55,000.00
17,000.00		17,000.00
36,975.00		36,975.00
171,075.00		171,075.00
	18,500.00	-18,500.00
	18,500.00	-18,500.00
	0.00	0.00
	5,000.00	-5,000.00
	0.00	0.00
	5,000.00	-5,000.00
	4,125.00	-4,125.00
	4,125.00	-4,125.00
	0.00	0.00
	150.00	-150.00
	14,350.00	-14,350.00
	14,500.00	-14,500.00
	45,957.00	-45,957.00
	0.00	0.00
	45,957.00	-45,957.00
	2,000.00	-2,000.00
	2,000.00	-2,000.00
	3,500.00	-3,500.00
	7,500.00	-7,500.00
	1,500.00	-1,500.00
	100.00	-100.00
	306.72	-306.72
	0.00	0.00
	0.00	0.00
	0.00	0.00
	1,375.00	-1,375.00
	14,350.00	-14,350.00
	0.00	0.00
	0.00	0.00
	6,000.00	-6,000.00
	23,631.72	-23,631.72
	119,213.72	-119,213.72
\$171,075.00	\$119,213.72	\$51,861.28

2017		
Actual Revenue	Actual Expenses	Actual Net
116,575.00		116,575.00
4,050.00		4,050.00
430.00		430.00
54,825.00		54,825.00
17,900.00		17,900.00
36,243.22		36,243.22
230,023.22		230,023.22
	18,500.00	-18,500.00
	18,500.00	-18,500.00
	0.00	0.00
	3,099.60	-3,099.60
	3,393.22	-3,393.22
	6,492.82	-6,492.82
	0.00	0.00
	0.00	0.00
	0.00	0.00
	2,860.00	-2,860.00
	14,350.00	-14,350.00
	17,210.00	-17,210.00
	59,535.44	-59,535.44
	0.00	0.00
	59,535.44	-59,535.44
	1,617.20	-1,617.20
	2,944.54	-2,944.54
	2,734.30	-2,734.30
	7,296.04	-7,296.04
	1,247.90	-1,247.90
	0.00	0.00
	385.88	-385.88
	0.00	0.00
	0.00	0.00
	0.00	0.00
	0.00	0.00
	14,667.20	-14,667.20
	0.00	0.00
	0.00	0.00
	6,000.00	-6,000.00
	22,300.98	-22,300.98
	131,335.28	-131,335.28
\$230,023.22	\$131,335.28	\$98,687.94

# NACM Revenue/Expenses by Category

## Publications - Q4200.0000/Q4200.6014/4200.2000/Q4200.3000

### REVENUE

Grant Income	A440-01	Q4200.6016 - SJI Grant
Advertising Income	A450-01	Q4200.1000 - Court Manager
		Q4200.2000 - Court Express
		Q4200.3000 - Website
Publication Sales	A460-01	Q4200.1000 - Court Manager
		<b>Publication Revenue Total</b>

### EXPENSES

Consultant	A500-01	Q4200.3000 - Website
Postage	A535-01	Q4200.1000 - Court Manager
Printing/Photocopying	A540-01	Q4200.1000 - Court Manager
		Q4200.2000 - Court Express
Grant Match - Consultant	A577-00	Q4200.3000 - Website
		<b>Publication Expense Total</b>
		<b>Total Publications</b>

## Membership - Q4400.0000

### REVENUE

Mbrshp. Dues-Reg.	A400-01	Q4400.0000	171,650.00	171,650.00
Mbrshp. Dues-Assoc.	A400-02	Q4400.0000	7,625.00	7,625.00
Mbrshp. Dues-Sustaining	A400-03	Q4400.0000	4,355.00	4,355.00
Mbrshp. Dues-Retired	A400-04	Q4400.0000	1,600.00	1,600.00
Mbrshp. Dues-Student	A400-07	Q4400.0000	245.00	245.00
			<u>185,475.00</u>	<u>185,475.00</u>

### EXPENSES

Postage	A535-01	Q4400.0000	1,000.00	-1,000.00
Printing/Photocopying	A540-01	Q4400.0000	250.00	-250.00
Office Supplies/Exp.	A545-01	Q4400.0000	400.00	-400.00
Awards	A585-02	Q4400.0000	1,000.00	-1,000.00
			<u>2,650.00</u>	<u>-2,650.00</u>
		<b>Total Membership</b>	<u>185,475.00</u>	<u>182,825.00</u>

## Guides- Q5000.0000/Q5000.6013/Q5000.6014

### REVENUE

Grant Income	A440-01	Q5000.6014 - SJI Grant (2014)	0.00	0.00
			<u>0.00</u>	<u>0.00</u>
Publication Sales	A460-01	Q5000.0000 - Guides	500.00	500.00
		<b>Guide Revenue Total</b>	<u>500.00</u>	<u>500.00</u>

### EXPENSES

Postage	A535-01	Q5000.0000 - Guides	0.00	0.00
Printing/Copying/Layout	A540-01	Q5000.0000 - Guides	1,200.00	-1,200.00
			<u>1,200.00</u>	<u>-1,200.00</u>
		<b>Guide Expense Total</b>	<u>1,200.00</u>	<u>-1,200.00</u>
		<b>Total Guides</b>	<u>\$500.00</u>	<u>\$1,200.00</u>

2017			2017		
Budget Revenue	Budget Expenses	Budget Net	Actual Revenue	Actual Expenses	Actual Net
0.00		0.00	0.00		0.00
0.00		0.00	0.00		0.00
16,000.00		16,000.00	10,824.50		10,824.50
		0.00	250.00		250.00
2,000.00		2,000.00	0.00		0.00
18,000.00		18,000.00	11,074.50		11,074.50
500.00		500.00			0.00
18,500.00		18,500.00	11,074.50		11,074.50
	3,500.00	-3,500.00		2,245.80	-2,245.80
	1,375.00	-1,375.00		2,325.66	-2,325.66
	20,000.00	-20,000.00		21,571.62	-21,571.62
	0.00	0.00		0.00	0.00
	20,000.00	-20,000.00		21,571.62	-21,571.62
	0.00	0.00		0.00	0.00
	0.00	0.00		0.00	0.00
	24,875.00	-24,875.00		26,143.08	-26,143.08
\$18,500.00	\$24,875.00	-\$6,375.00	\$11,074.50	\$26,143.08	-\$15,068.58
171,650.00		171,650.00	111,470.34		111,470.34
7,625.00		7,625.00	9,190.00		9,190.00
4,355.00		4,355.00	2,450.00		2,450.00
1,600.00		1,600.00	1,200.00		1,200.00
245.00		245.00	140.00		140.00
185,475.00		185,475.00	124,450.34		124,450.34
	1,000.00	-1,000.00		1,202.84	-1,202.84
	250.00	-250.00		0.00	0.00
	400.00	-400.00		39.39	-39.39
	1,000.00	-1,000.00		183.45	-183.45
	2,650.00	-2,650.00		1,425.68	-1,425.68
185,475.00	2,650.00	182,825.00	124,450.34	1,425.68	123,024.66
0.00		0.00	0.00		0.00
0.00		0.00	0.00		0.00
500.00		500.00	1,375.00		1,375.00
500.00		500.00	1,375.00		1,375.00
	0.00	0.00		85.51	-85.51
	1,200.00	-1,200.00		1,517.50	-1,517.50
	1,200.00	-1,200.00		1,603.01	-1,603.01
	1,200.00	-1,200.00		1,603.01	-1,603.01
\$500.00	\$1,200.00	-\$700.00	\$1,375.00	\$1,603.01	-\$228.01

## FACT Q5500.0000

<b>EXPENSES</b>		
Travel - General	A510-00	Q5500.0000 - FACT
Food & Beverage	A518-01	Q5500.0000 - FACT
Conference Expenses	A520-01	Q5500.0000 - FACT
Website Development	A528-01	Q5500.0000 - FACT
Postage	A535-01	Q5500.0000 - FACT
Printing/Photocopying	A540-01	Q5500.0000 - FACT
Office Supplies/Exp.	A545-01	Q5500.0000 - FACT
Contributions	A570-01	Q5500.0000 - FACT
Admin Support/Contract	A575-01	Q5500.0000 - FACT

**FACT Expense Total**

## REVENUE

EXPENSES		
Consultant	A500-01	Q7002.0000- SJI Core
Travel - General	A510-00	Q7002.0000- SJI Core

**SJI Core Expense Total**

**\$149,703.57**



# National Assoc. for Court Management

Date: 9/21/2017

## Financial Statements

Calendar Year: 2017    Month: 8.00

Current Period

Year to Date

### Balance Sheet

Cash - Wells Fargo	174,131.69
CD Mny Mkt - Wells Fargo	12,991.07
Investment - Wells Fargo	500,510.69
Accounts Receivable	66,104.38
Prepays and Advances	17,500.00
<i>Assets</i>	<u>771,237.83</u>
<b>Total Assets</b>	<u><b>771,237.83</b></u>
Accounts Payable	1,500.00
Accrued Contract Fees	0.00
FACT Dues Refundable	0.00
Deferred Conference Income	0.00
Deferred Dues Income	880.00
<i>Liabilities</i>	<u>2,380.00</u>
Fact	0.00
Special Projects/Donations	9,892.30
Unrestricted Fund Balance	563,098.84
Current Year Gain (Loss)	195,866.69
<i>Net Assets</i>	<u>768,857.83</u>
<b>Total Liabilities and Net Assets</b>	<u><b>771,237.83</b></u>



# National Assoc. for Court Management

Date: 9/21/2017

## Financial Statements

Calendar Year: 2017 Month: 8.00

Current Period

Year to Date

### Income Statement

Membership Dues	7,660.00	123,975.34
Donations	17.07	10,304.54
In-Kind Contribution-NCSC	15,000.00	67,500.00
Interest/Investment Income	55.83	5,205.60
Gain/(Loss) on Investments	1,803.50	55,457.31
Fees/Registratoins	17,705.00	559,060.12
Social Fees	125.00	14,040.00
Sponsorship Income	0.00	78,533.00
Vendor Income	0.00	237,625.00
Grant Income	59,089.40	105,383.10
Advertising Income	6,173.00	10,759.50
Publication Sales	0.00	1,375.00
Sales & Other Income	0.00	0.00
<i>Revenue</i>	<u>107,628.80</u>	<u>1,269,218.51</u>

Consultants	0.00	24,595.80
Travel	12,727.88	53,460.69
Honoraria	16,500.00	18,750.00
Audio Visual	42,531.25	59,741.25
Food and Beverage	203,081.08	264,937.39
Conference Expenses	114,623.65	170,382.98
President's Discretionary	32.09	499.92
Committee Expenses	727.57	727.57
Office Expenses	10,873.01	49,673.92
Licenses and Fees	304.20	18,600.01
Scholarship/Awards/Contrb.	45.53	11,197.19
Audit Fees	0.00	0.00
Admin. Supp/Contract Fee	61,577.16	277,097.22
Grant Match	67,399.24	123,687.88
<i>Expenses</i>	<u>530,422.66</u>	<u>1,073,351.82</u>

<i>Total Expenses</i>	<u>530,422.66</u>	<u>1,073,351.82</u>
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<i>Current Gain (Loss)</i>	<u>(422,793.86)</u>	<u>195,866.69</u>
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NACM-OPERATING ACCOUNT C/O  
NATIONAL CENTER FOR STATE COUR  
300 NEWPORT AVENUE  
WILLIAMSBURG VA 23185-4147

## SNAPSHOT

### Current period ending August 31, 2017

ACCOUNT NAME: NACM-OPERATING ACCOUNT C/O  
NATIONAL CENTER FOR STATE COUR

ACCOUNT NUMBER: 5202-2094

Your Financial Advisor:  
HARGROVE WEALTH MANAGEMENT 428 MCLAWS CIRCLE STE 100  
GROUP WILLIAMSBURG VA 23185  
OF WELLS FARGO ADVISORS  
Phone: 757-229-7833

If you have more than one account with us, why not link them and receive summary information for your entire household? Contact Your Financial Advisor for more details.

### Message from Wells Fargo Advisors

IT'S IMPORTANT THAT INVESTORS UNDERSTAND THE FORCES THAT SHAPE EACH GENERATION'S INVESTMENT BEHAVIOR AND PURSUIT OF FINANCIAL GOALS. LEARN MORE IN OUR "SEEING WEALTH DIFFERENTLY ACROSS GENERATIONS" REPORT. VISIT [WELLSFARGOADVISORS.COM/GENERATIONS](http://WELLSFARGOADVISORS.COM/GENERATIONS) TO DOWNLOAD YOUR FREE COPY.

### News

COMMAND ASSET PROGRAM HAS BEEN RENAMED BROKERAGE CASH SERVICES AND IS REFLECTED ON YOUR STATEMENT. WHILE THE NAME HAS CHANGED, OUR COMMITMENT TO PROVIDING VALUABLE SERVICES IS UNCHANGED. USE BROKERAGE CASH SERVICES FOR EASY ACCESS TO WELLS FARGO ONLINE AND MOBILE CASH MANAGEMENT.

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company.

Investments and insurance products are:

NOT FDIC-INSURED

NO BANK GUARANTEE

MAY LOSE VALUE

SNAPSHOT  
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# General instructions and disclosures

## About this statement

### Clearing services

Wells Fargo Clearing Services, LLC (Wells Fargo Advisors), an indirect wholly owned subsidiary of Wells Fargo & Company, is a clearing broker-dealer registered with the Securities and Exchange Commission (SEC) and is a member of the New York Stock Exchange (NYSE), the Financial Industry Regulatory Authority (FINRA) and all principal U.S. exchanges. Wells Fargo Advisors carries your account(s) and acts as your custodian for funds and securities deposited with us directly by you, or as a result of transactions we process for your account. Twice a year, Wells Fargo Advisors publishes on its web site [www.wfclearing.com](http://www.wfclearing.com) a statement of the firm's financial condition. Alternatively, a printed statement is available to you upon request.

### Trade date statement

All activity and positions on this statement are shown as of the date a trade is entered on the brokerage trading system (i.e., the trade date). Proceeds from the sale of securities and costs for the purchase of securities are not transacted through your account until the actual settlement date of the trade, which may be up to three business days after the trade date (or longer for certain securities with an extended settlement date).

### Pricing of securities

Securities prices reflected on your statement may vary from actual liquidation value. Prices shown are provided by outside quotation services which we believe to be reliable but due to the nature of market data the accuracy of such prices cannot be guaranteed, or in the absence of such pricing, are estimated by Wells Fargo Advisors using available information and its judgment. Such estimates may not reflect actual trades and do not reflect a commitment by the firm to buy or sell at those prices. Securities listed on a national exchange such as the NYSE or Nasdaq Stock Market are priced as of the close of the statement period. Unlisted shares may be valued at the current best published "bid-price", and, if none exists, the last reported transaction if occurring within the last 45 days. Prices of securities not actively traded may not be available and are indicated by "N/A." Corporate and municipal bonds and other fixed income securities are priced by a computerized pricing service or, for less actively traded issues, by utilizing a yield-based matrix system to arrive at an estimated market value. Listed options are priced based on the closing "bid-ask" prices and the last reported trade. Mutual fund shares are priced at net asset value. Shares of direct participation program (DPP) and real estate investment trust (REIT) securities that are not listed on a national exchange are generally illiquid. Because no formal trading market may exist for these investments, their values are estimated. Unless otherwise indicated, the values shown for DPP and REIT securities have been provided by the management of each program and represent that management's estimate of the investor's interest in the net assets of the program. See statement sections for additional pricing information. Prices for hedge funds and certain managed futures funds are provided on a month delay basis. Other managed futures funds may be priced more frequently. Long-term certificates of deposit (maturity beyond one year from date of issue) are priced using a market value pricing model. Generally, the sale or redemption price of your securities may be higher or lower than the prices shown on your statement. For an actual quote, contact the individual servicing your account.

### Estimated annual income/yield

Estimated Annual Income (EAI), when available, reflects the estimated amount you would earn on a security if your current position and its related income remained constant for a year. Estimated Annual Yield (EAY), when available, reflects the current estimated annual income divided by the current value of the security as of the statement closing date. EAI and EAY are estimates and the actual income and yield might be lower or higher than the estimated amounts. EAY reflects only the income generated by an investment. It does not reflect changes in its price, which may fluctuate. The information used to derive these estimates is obtained from various outside vendors; Wells Fargo Advisors is not responsible for incorrect or missing estimated annual income and yields. Past performance is not a guarantee of future results.

### Income summary

The Income summary displays all income as recorded in the tax system as of period end date. The totals in the Cash flow snapshot may not match the totals in the Income snapshot due to reclassifications or other corrections made in the tax system. Remember, you may have certain products that are not included in these figures and whose income is only available on the tax forms sent to you at year-end. Reclassifications and other tax reporting requirements may alter these numbers both during and after year end. You should rely only on tax reporting documents. Contact your tax advisor if you have any questions about the tax consequences of your brokerage activity.

## About your rights and responsibilities

### Questions and complaints about Your Account

This account statement contains important information about your brokerage account, including recent transactions. All account statements sent to you shall be deemed complete and accurate if not objected to in writing within ten days of receipt. We encourage you to review the details in this statement. If you do not understand any of the information in your statement or if you believe there are any inaccuracies or discrepancies in your statement, you should promptly report them to the manager of the Wells Fargo Advisors office listed on the front of your statement. To further protect your rights, including any rights under the Securities Investor Protection Act, any verbal communications with Wells Fargo Advisors should be re-confirmed in writing. Inquiries or complaints about your account statement, including the positions and balances in your account, may be directed to **Wells Fargo Advisors Client Services at (866) 887-2402 or ATTN: H0005-087, 1 N. Jefferson Ave, St. Louis, MO 63103.**

**Public Disclosure:** You may reach FINRA by calling the FINRA BrokerCheck Hotline at **(800) 289-9999** or by visiting the FINRA website at [www.finra.org](http://www.finra.org). An investor brochure that includes information describing FINRA BrokerCheck is available from FINRA upon request. A brochure describing the FINRA Pricing of Securities Regulation Public Disclosure Program is also available from the FINRA upon request.

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Wells Fargo Advisors is a member of the Securities Investor Protection Corporation (SIPC) which protects against the loss of cash and securities held in client accounts of a SIPC member firm in the event of the member's insolvency and liquidation. SIPC coverage is limited to \$500,000 per customer, including up to \$250,000 for cash. For more information on SIPC coverage, please see the explanatory brochure at [www.sipc.org](http://www.sipc.org) or contact SIPC at **(202) 371-8300**. In addition, Wells Fargo Advisors maintains additional insurance coverage provided by Lexington Insurance Company (Lexington). This additional insurance policy becomes available to clients if their SIPC limit is exhausted and provides additional protection up to a firm aggregate of \$1 billion, including up to \$1.9 million for cash per client. SIPC does not insure the quality of investments or protect against market losses. SIPC only protects the custody function of their members, which means that SIPC works to restore to clients their securities and cash that are in their accounts when the member firm liquidation begins. Not all investments are protected by SIPC. In general, SIPC does not cover instruments such as unregistered investment contracts, unregistered limited partnerships, fixed annuity contracts, escrow receipts, direct investments, currency, commodities or related contracts, hedge funds and certain other investments.

### Investor education

Wells Fargo Advisors publishes on its web site [www.wellsfargoadvisors.com](http://www.wellsfargoadvisors.com) information on topics of interest to investors as well as market commentary and economic analysis. Wells Fargo Advisors has also developed numerous investor education guides to provide you with important information regarding the products and services we offer. These guides may be found under the "Our Insights" tab.

### Free credit balances

Free credit balances are not segregated and may be used by Wells Fargo Advisors in the operation of its business in accordance with applicable laws and regulations. You have the right to receive from us in the course of normal business operations, subject to any open commitments in any of your accounts, any free credit balances to which you are entitled.

### Investment objectives/Risk tolerances

Please inform us promptly of any material change that might affect your investment objectives, risk tolerances or financial situation, or if you wish to impose or change any reasonable restrictions on the management of your account. A copy of the Investment Advisory Services Disclosure document is available without charge upon request. Please contact the individual denoted on the front of your statement to update your information and to receive a copy of this document.

### Tax reporting

We are required by federal law to report annually to you and to the Internal Revenue Service (IRS) on Form(s) 1099 interest income, dividend payments and sales proceeds including cost basis information for applicable transactions credited to your account.





## SNAPSHOT

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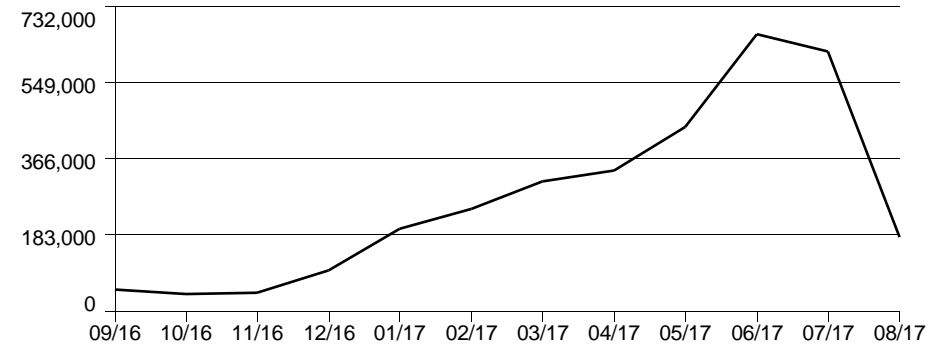
**NACM-OPERATING ACCOUNT C/O  
NATIONAL CENTER FOR STATE COUR**

AUGUST 1, 2017 - AUGUST 31, 2017  
ACCOUNT NUMBER: 5202-2094

### Progress summary

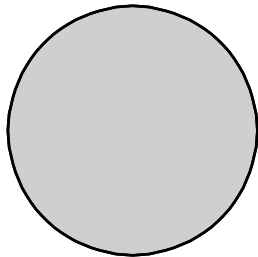
	THIS PERIOD	THIS YEAR
<b>Opening value</b>	<b>\$623,542.28</b>	<b>\$98,351.85</b>
Cash deposited	16,341.91	1,060,052.63
Securities deposited	0.00	0.00
Cash withdrawn	-461,814.41	-980,377.07
Securities withdrawn	0.00	0.00
Change in value	16.81	59.18
<b>Closing value</b>	<b>\$178,086.59</b>	<b>\$178,086.59</b>

### Value over time



### Portfolio summary

CURRENT



**ASSETS**

	Cash and sweep balances
	Stocks, options & ETFs
	Fixed income securities
	Mutual funds

ASSET TYPE	PREVIOUS VALUE ON JUL 31	%	CURRENT VALUE ON AUG 31	%	ESTIMATED ANN. INCOME
Cash and sweep balances	623,542.28	100.00	178,086.59	100.00	89
Stocks, options & ETFs	0.00	0.00	0.00	0.00	0
Fixed income securities	0.00	0.00	0.00	0.00	0
Mutual funds	0.00	0.00	0.00	0.00	0
<b>Asset value</b>	<b>\$623,542.28</b>	<b>100%</b>	<b>\$178,086.59</b>	<b>100%</b>	<b>\$89</b>

# SNAPSHOT

NACM-OPERATING ACCOUNT C/O  
NATIONAL CENTER FOR STATE COUR

AUGUST 1, 2017 - AUGUST 31, 2017  
ACCOUNT NUMBER: 5202-2094

## Cash flow summary

	THIS PERIOD	THIS YEAR
<b>Opening value of cash and sweep balances</b>	<b>\$623,542.28</b>	
Deposits	6,840.00	386,311.82
Income and distributions	16.81	59.18
Electronic funds transfers	9,501.91	673,740.81
<b>Net additions to cash</b>	<b>\$16,358.72</b>	<b>\$1,060,111.81</b>
Withdrawals by check	-461,784.41	-976,977.60
Electronic funds transfers	-30.00	-3,399.47
<b>Net subtractions from cash</b>	<b>-\$461,814.41</b>	<b>-\$980,377.07</b>
<b>Closing value of cash and sweep balances</b>	<b>\$178,086.59</b>	

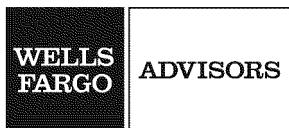
## Income summary \*

	THIS PERIOD	THIS YEAR
<b>TAXABLE</b> Money market/sweep funds	16.81	59.18
<b>Total taxable income</b>	<b>\$16.81</b>	<b>\$59.18</b>
<b>Total federally tax-exempt income</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Total income</b>	<b>\$16.81</b>	<b>\$59.18</b>

\* Certain distributions made in the current year are reported as prior year income according to IRS regulations. This may cause a difference between Cash Flow and Income Summary totals.

## Gain/loss summary

	UNREALIZED	THIS PERIOD REALIZED	THIS YEAR REALIZED
Short term (S)	0.00	0.00	0.00
Long term (L)	0.00	0.00	0.00
<b>Total</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>



## SNAPSHOT

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**NACM-OPERATING ACCOUNT C/O  
NATIONAL CENTER FOR STATE COUR**

AUGUST 1, 2017 - AUGUST 31, 2017  
ACCOUNT NUMBER: 5202-2094

### Your Financial Advisor

HARGROVE WEALTH MANAGEMENT GROUP 428 MCLAWS CIRCLE STE 100  
OF WELLS FARGO ADVISORS WILLIAMSBURG VA 23185  
Phone: 757-229-7833

### Client service information

Client service: 800-266-6263  
En español: 800-326-8977  
Website: [www.wellsfargoadvisors.com](http://www.wellsfargoadvisors.com)

### Account profile

Full account name: NACM-OPERATING ACCOUNT C/O  
NATIONAL CENTER FOR STATE COUR  
Account type: Brokerage Cash Services  
Brokerage account number: 5202-2094  
Brokerage Cash Services number: 9088773692  
Tax status: Corporate  
Investment objective/Risk tolerance:\* AGGRESSIVE GROWTH  
Time horizon:\* LONG TERM (10+ YEARS)  
Liquidity needs:\* MODERATE  
Cost Basis Election: First in, First out  
Sweep option: BANK DEPOSIT SWEEP

\*For more information, please visit us at: [www.wellsfargoadvisors.com/disclosures](http://www.wellsfargoadvisors.com/disclosures)

### Available funds

Cash	0.00
Money market and sweep funds	178,086.59
Available for loan	0.00
<b>Your total available funds</b>	<b>\$178,086.59</b>

### For your consideration

Go paperless. Accessing your account documents online is easy, secure, and costs nothing. Sign on to [wellsfargoadvisors.com](http://wellsfargoadvisors.com) with your Access Online Username and Password, select **Statements & Docs**, and then click on the **Delivery Preferences** Quick Link. Choose **Electronic Delivery** to go paperless or select specific account documents for electronic delivery. If you do not have a Username and Password, visit [wellsfargoadvisors.com/signup](http://wellsfargoadvisors.com/signup) or call 1-877-879-2495 for enrollment assistance.

### Document delivery status

	Paper	Electronic
Statements:	X	
Trade confirmations:	X	
Tax documents:	X	
Shareholder communications:	X	
Other documents:	X	

**NACM-OPERATING ACCOUNT C/O  
NATIONAL CENTER FOR STATE COURTS**

AUGUST 1, 2017 - AUGUST 31, 2017  
ACCOUNT NUMBER: 5202-2094

## Portfolio detail

### Cash and Sweep Balances

Sweep Balances - You have the right, in the course of normal business operations, to withdraw balances in the Bank Deposit Sweep or redeem shares of the money market mutual fund used in the sweep, subject to any open commitments in any of your accounts and have the proceeds returned to your accounts or remitted to you. Note, however, that as required by federal banking regulations, the banks in the Bank Deposit Sweep reserve the right to require seven days prior notice before permitting a transfer out of the Bank Deposit Sweep. In addition, the money market mutual funds in the sweep reserve the right to require one or more day's prior notice before permitting withdrawals.

Bank Deposit Sweep - Consists of monies held at Wells Fargo Bank, N.A. and (if amounts exceed \$250,000) at one or more other Wells Fargo affiliated banks. These assets are not covered by SIPC, but are instead eligible for FDIC insurance of up to \$250,000 per depositor, per institution, in accordance with FDIC rules. For additional information on the Bank Deposit Sweep for your account, please contact Your Financial Advisor.

DESCRIPTION	% OF ACCOUNT	ANNUAL PERCENTAGE YIELD EARNED*	CURRENT MARKET VALUE	ESTIMATED ANNUAL INCOME
BANK DEPOSIT SWEEP	100.00	0.05	178,086.59	89.04
Interest Period 08/01/17 - 08/31/17				
<b>Total Cash and Sweep Balances</b>	<b>100.00</b>		<b>\$178,086.59</b>	<b>\$89.04</b>

\* APYE measures the total amount of the interest paid on an account based on the interest rate and the frequency of the compounding during the interest period. The annual percentage yield earned is expressed as an annualized rate, based on a 365 day year.

## Activity detail

### Deposits

DATE	ACCOUNT TYPE	TRANSACTION	QUANTITY	DESCRIPTION	PRICE	AMOUNT
08/07	Cash	DEPOSIT		TRANSFER TO BROKERAGE		1,310.00
08/14	Cash	DEPOSIT		TRANSFER TO BROKERAGE		2,995.00
08/21	Cash	DEPOSIT		TRANSFER TO BROKERAGE		600.00
08/28	Cash	DEPOSIT		TRANSFER TO BROKERAGE		1,935.00
<b>Total Deposits:</b>						<b>\$6,840.00</b>

### Income and distributions

DATE	ACCOUNT TYPE	TRANSACTION	QUANTITY	DESCRIPTION	PRICE	AMOUNT
08/31	Cash	INTEREST		BANK DEPOSIT SWEEP 083117 178,069		16.81
<b>Total Income and distributions:</b>						<b>\$16.81</b>



**NACM-OPERATING ACCOUNT C/O  
NATIONAL CENTER FOR STATE COURTS**

AUGUST 1, 2017 - AUGUST 31, 2017  
ACCOUNT NUMBER: 5202-2094

## Activity detail continued

### Electronic funds transfer

DATE	ACCOUNT TYPE	TRANSACTION	DESCRIPTION	AMOUNT
08/01	Cash	AUTO ACTIVITY	PAYPAL TRANSFE 4WDJ2A7WF8GY4	821.74
08/02	Cash	AUTO ACTIVITY	PAYPAL TRANSFE 4WDJ2A7XJA4FN	155.07
08/03	Cash	AUTO ACTIVITY	PAYPAL TRANSFE 4WDJ2A7YMM2ML	121.32
08/04	Cash	AUTO ACTIVITY	PAYPAL TRANSFE 4WDJ2A7ZQQ8T6	154.37
08/07	Cash	AUTO ACTIVITY	PAYPAL TRANSFE 4WDJ2A82NTW98	363.26
08/08	Cash	AUTO ACTIVITY	PAYPAL TRANSFE 4WDJ2A85AQEXN	121.32
08/09	Cash	AUTO ACTIVITY	PAYPAL TRANSFE 4WDJ2A86CJQYL	154.77
08/10	Cash	AUTO ACTIVITY	PAYPAL TRANSFE 4WDJ2A87GD3PN	485.28
08/10	Cash	AUTO ACTIVITY	AMZNJ64UFSM1 AmazonS WVXMJ2SV73U5KAV	17.07
08/17	Cash	AUTO ACTIVITY	PAYPAL TRANSFE 4WDJ2A8E8C9CG	121.32
08/18	Cash	AUTO ACTIVITY	PAYPAL TRANSFE 4WDJ2A8F8XYNJ	502.74
08/22	Cash	AUTO ACTIVITY	PAYPAL TRANSFE 4WDJ2A8JSAPBU	67.50
08/23	Cash	AUTO ACTIVITY	PAYPAL TRANSFE 4WDJ2A8KSSZ54	121.32
08/24	Cash	AUTO ACTIVITY	PAYPAL TRANSFE 4WDJ2A8LUST2W	829.17
08/28	Cash	AUTO ACTIVITY	PAYPAL TRANSFE 4WDJ2A8NT2BN8	241.94
08/29	Cash	AUTO ACTIVITY	PAYPAL TRANSFE 4WDJ2A8R9C4B8	1,839.03
08/30	Cash	AUTO ACTIVITY	PAYPAL TRANSFE 4WDJ2A8SAFJ6E	1,836.34
08/30	Cash	AUTO ACTIVITY	MN State-MMB ACH 0004125738	1,500.00

**NACM-OPERATING ACCOUNT C/O  
NATIONAL CENTER FOR STATE COURTS**

AUGUST 1, 2017 - AUGUST 31, 2017  
ACCOUNT NUMBER: 5202-2094

## Activity detail continued

### Electronic funds transfer

DATE	ACCOUNT TYPE	TRANSACTION	DESCRIPTION	AMOUNT
08/31	Cash	AUTO ACTIVITY	PAYPAL TRANSFER 4WDJ2A8TCJ232	48.35
<b>Total Electronic funds transfer:</b>				<b>\$9,501.91</b>

### Withdrawals by check

Entries that display a blank in the expense code field are checks generated by the firm based upon standing or specific instructions that you have provided.

DATE	ACCOUNT TYPE	CHECK NUMBER	DESCRIPTION	EXPENSE CODE	AMOUNT
08/01	Cash	0006698	JOSEPH HAMM	Unspecified	-375.12
08/24	Cash	0006703*	THE KY STATE TREAS	Unspecified	-500.00
08/01	Cash	0006706*	ADCOM WORLDWIDE	Unspecified	-472.50
08/02	Cash	0006707	FREEMAN	Unspecified	-7,528.27
08/07	Cash	0006708	GARY MARCHANT	Unspecified	-1,009.40
08/04	Cash	0006709	JEFF CHAPPLE	Unspecified	-40.02
08/07	Cash	0006710	LARRY ARNTZ INC	Unspecified	-4,998.47
08/02	Cash	0006711	MARK M DALTON	Unspecified	-262.19
08/03	Cash	0006712	MARY CELESTE	Unspecified	-739.90
08/07	Cash	0006714*	SAHIRA J ABDOOL	Unspecified	-326.20
08/01	Cash	0006715	SHAUN R FLOERKE	Unspecified	-1,750.00
08/03	Cash	0006717*	THE CARDELL GROUP	Unspecified	-3,500.00
08/07	Cash	0006718	WELLS FARGO INS SERV USA	Unspecified	-5,501.91
08/11	Cash	0006719	KRISTEN TREBIL HALBERSMA	Unspecified	-250.00
08/10	Cash	0006720	AMY M LECHUGA	Unspecified	-198.19
08/17	Cash	0006721	KELLY TAIT	Unspecified	-2,017.39
08/10	Cash	0006722	LARRY ARNTZ INC	Unspecified	-2,904.08
08/07	Cash	0006730*	NATL CTRE FOR STATE COURTS	Unspecified	-28,734.50
08/10	Cash	0006731	PAUL J. BURKE	Unspecified	-267.19
08/09	Cash	0006732	PRESTIGE PRESS INC	Unspecified	-9,448.14
08/08	Cash	0006733	STEPHANIE E HESS ESQ	Unspecified	-397.00



**NACM-OPERATING ACCOUNT C/O  
NATIONAL CENTER FOR STATE COURTS**

AUGUST 1, 2017 - AUGUST 31, 2017  
ACCOUNT NUMBER: 5202-2094

## Activity detail continued

### Withdrawals by check

DATE	ACCOUNT TYPE	CHECK NUMBER	DESCRIPTION	EXPENSE CODE	AMOUNT
08/11	Cash	0006734	MS VICKY CARLSON	Unspecified	-746.21
08/09	Cash	0006735	YOLANDA L LEWIS	Unspecified	-392.94
08/14	Cash	0006737*	ADCOM WORLDWIDE	Unspecified	-529.20
08/15	Cash	0006738	PATRICIA TOBIAS	Unspecified	-304.89
08/17	Cash	0006739	LEVEL 3 COMM LLC	Unspecified	-42.50
08/18	Cash	0006740	KAREN FREEMAN WILSON	Unspecified	-1,000.00
08/16	Cash	0006741	KEVIN W EIDE	Unspecified	-346.40
08/16	Cash	0006742	HYATT REGENCY CRYSTAL CITY	Unspecified	-304,780.48
08/23	Cash	0006743	KATHRYN S GRIFFIN	Unspecified	-1,063.81
08/24	Cash	0006745*	GRAND HYATT WA	Unspecified	-49,450.40
08/28	Cash	0006746	NATL CENTER FOR STATE COURTS	Unspecified	-29,212.75
08/31	Cash	0006748*	MS VICKY CARLSON	Unspecified	-1,473.70
08/29	Cash	0006749	WELLS FARGO	Unspecified	-1,220.66

\* Checks out of sequence

**Total Withdrawals by check: -\$461,784.41**

### Electronic funds transfer

DATE	ACCOUNT TYPE	TRANSACTION	DESCRIPTION	AMOUNT
08/03	Cash	AUTO ACTIVITY	PAYPAL INC PAYPAL X4248066774	-30.00

**Total Electronic funds transfer: -\$30.00**

## Cash sweep activity

Our Cash Sweep program allows you to earn a return on the idle cash balances in your account by automatically investing such balances into one of our cash sweep options. These 'sweep transactions' may represent a net amount for the day and occur on settlement date. The following section displays transfers into and out of your sweep option. Transactions displayed here are Transfer To, Transfer From and Reinvested Dividends and Interest. These transaction amounts are not included in your cash flow summary.

DATE	TRANSACTION	DESCRIPTION	AMOUNT	DATE	TRANSACTION	DESCRIPTION	AMOUNT
08/01		BEGINNING BALANCE	623,542.28	08/02	TRANSFER TO	BANK DEPOSIT SWEEP	155.07
08/01	TRANSFER TO	BANK DEPOSIT SWEEP	821.74	08/02	TRANSFER FROM	BANK DEPOSIT SWEEP	-7,790.46
08/01	TRANSFER FROM	BANK DEPOSIT SWEEP	-2,597.62	08/03	TRANSFER TO	BANK DEPOSIT SWEEP	121.32

**NACM-OPERATING ACCOUNT C/O  
NATIONAL CENTER FOR STATE COURTS**

AUGUST 1, 2017 - AUGUST 31, 2017  
ACCOUNT NUMBER: 5202-2094

### Cash sweep activity continued

DATE	TRANSACTION	DESCRIPTION	AMOUNT	DATE	TRANSACTION	DESCRIPTION	AMOUNT
08/03	TRANSFER FROM	BANK DEPOSIT SWEEP	-4,269.90	08/18	TRANSFER TO	BANK DEPOSIT SWEEP	502.74
08/04	TRANSFER TO	BANK DEPOSIT SWEEP	154.37	08/18	TRANSFER FROM	BANK DEPOSIT SWEEP	-1,000.00
08/04	TRANSFER FROM	BANK DEPOSIT SWEEP	-40.02	08/21	TRANSFER TO	BANK DEPOSIT SWEEP	600.00
08/07	TRANSFER TO	BANK DEPOSIT SWEEP	1,673.26	08/22	TRANSFER TO	BANK DEPOSIT SWEEP	67.50
08/07	TRANSFER FROM	BANK DEPOSIT SWEEP	-40,570.48	08/23	TRANSFER TO	BANK DEPOSIT SWEEP	121.32
08/08	TRANSFER TO	BANK DEPOSIT SWEEP	121.32	08/23	TRANSFER FROM	BANK DEPOSIT SWEEP	-1,063.81
08/08	TRANSFER FROM	BANK DEPOSIT SWEEP	-397.00	08/24	TRANSFER TO	BANK DEPOSIT SWEEP	829.17
08/09	TRANSFER TO	BANK DEPOSIT SWEEP	154.77	08/24	TRANSFER FROM	BANK DEPOSIT SWEEP	-49,950.40
08/09	TRANSFER FROM	BANK DEPOSIT SWEEP	-9,841.08	08/28	TRANSFER TO	BANK DEPOSIT SWEEP	2,176.94
08/10	TRANSFER TO	BANK DEPOSIT SWEEP	502.35	08/28	TRANSFER FROM	BANK DEPOSIT SWEEP	-29,212.75
08/10	TRANSFER FROM	BANK DEPOSIT SWEEP	-3,369.46	08/29	TRANSFER TO	BANK DEPOSIT SWEEP	1,839.03
08/11	TRANSFER FROM	BANK DEPOSIT SWEEP	-996.21	08/29	TRANSFER FROM	BANK DEPOSIT SWEEP	-1,220.66
08/14	TRANSFER TO	BANK DEPOSIT SWEEP	2,995.00	08/30	TRANSFER TO	BANK DEPOSIT SWEEP	3,336.34
08/14	TRANSFER FROM	BANK DEPOSIT SWEEP	-529.20	08/31	REINVEST INT	BANK DEPOSIT SWEEP	16.81
08/15	TRANSFER FROM	BANK DEPOSIT SWEEP	-304.89	08/31	TRANSFER TO	BANK DEPOSIT SWEEP	48.35
08/16	TRANSFER FROM	BANK DEPOSIT SWEEP	-305,126.88	08/31	TRANSFER FROM	BANK DEPOSIT SWEEP	-1,473.70
08/17	TRANSFER TO	BANK DEPOSIT SWEEP	121.32	08/31		ENDING BALANCE	178,086.59
08/17	TRANSFER FROM	BANK DEPOSIT SWEEP	-2,059.89				

### Bank Deposits Through Teller

August 1 - August 31

**Wells Fargo Bank, N.A. (Member FDIC)**

**Account number 9088773692**

**Questions? Call us at 1-800-266-6263**

Deposits made in a bank branch on the last business day of the month will typically appear on your next statement.

DATE	TRANSACTION	DESCRIPTION	AMOUNT	BANK BALANCE
08/01		BEGINNING BALANCE		\$0.00
08/04	DEPOSIT	BANK DEPOSIT	1,310.00	1,310.00
08/04	TRANSFER	TRANSFER TO BROKERAGE	-1,310.00	0.00



**NACM-OPERATING ACCOUNT C/O  
NATIONAL CENTER FOR STATE COUR**AUGUST 1, 2017 - AUGUST 31, 2017  
ACCOUNT NUMBER: 5202-2094**Bank Deposits Through Teller continued**

DATE	TRANSACTION	DESCRIPTION	AMOUNT	BANK BALANCE
08/11	DEPOSIT	BANK DEPOSIT	2,995.00	2,995.00
08/11	TRANSFER	TRANSFER TO BROKERAGE	-2,995.00	0.00
08/18	DEPOSIT	BANK DEPOSIT	600.00	600.00
08/18	TRANSFER	TRANSFER TO BROKERAGE	-600.00	0.00
08/25	DEPOSIT	BANK DEPOSIT	1,935.00	1,935.00
08/25	TRANSFER	TRANSFER TO BROKERAGE	-1,935.00	0.00
08/31		ENDING BALANCE		\$0.00

**Specific instructions and disclosures****Available funds**

"Available for loan" reflects the approximate amount available as of the statement period ending date and should be reduced by any pending checks and Visa charges not yet cleared. This amount is the approximate amount available for withdrawal and loans. A margin loan is a variable rate loan secured by your account.

**Income on non-reportable accounts**

Your income summary is categorized into taxable and tax-exempt income based upon the securities that you hold. Please be aware that, since this is a 1099 non-reportable account, this income will NOT be reported to the IRS, but is being provided to you for informational purposes only.

**Cost basis - To add or update information or modify your reporting options, please contact Your Financial Advisor.**

This statement presents estimated unrealized or realized gains or losses for your information only. If acquisition or other information is not available, the gain/loss information may not be displayed and section and summary totals may not reflect your complete portfolio. Cost basis information is not verified by Wells Fargo Advisors and should not be relied upon for legal or tax purposes. Revisions to this information (due to corporate mergers, tenders and other reorganizations) may be required from time to time.

Cost basis for factored bonds (GNMA, CMO, etc.) will be adjusted for paydown of principal. Systematic investments in mutual funds and reinvested dividends for mutual funds and stocks have been consolidated for each position. Unit cost data for systematic investments and dividend reinvestment securities is provided for informational purposes only and is a non-weighted average.

Your account statement should not be used for tax preparation without assistance from your tax consultant. We do not report capital gains or losses for non-covered securities to the IRS.

**Cost basis options**

Unless specific tax lots are selected at trade time, sales of tax lots will occur using the cost basis election reflected in the Account profile section.

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NACM-INVESTMENT ACCOUNT C/O  
NATIONAL CENTER FOR STATE COUR  
300 NEWPORT AVENUE  
WILLIAMSBURG VA 23185

## SNAPSHOT

### Current period ending August 31, 2017

ACCOUNT NAME: NACM-INVESTMENT ACCOUNT C/O  
NATIONAL CENTER FOR STATE COUR

ACCOUNT NUMBER: 5042-8996

Your Financial Advisor:  
HARGROVE WEALTH MANAGEMENT 428 MCLAWS CIRCLE STE 100  
GROUP WILLIAMSBURG VA 23185  
OF WELLS FARGO ADVISORS  
Phone: 757-229-7833

If you have more than one account with us, why not link them and receive summary information for your entire household? Contact Your Financial Advisor for more details.

#### Message from Wells Fargo Advisors

IT'S IMPORTANT THAT INVESTORS UNDERSTAND THE FORCES THAT SHAPE EACH GENERATION'S INVESTMENT BEHAVIOR AND PURSUIT OF FINANCIAL GOALS. LEARN MORE IN OUR "SEEING WEALTH DIFFERENTLY ACROSS GENERATIONS" REPORT. VISIT [WELLSFARGOADVISORS.COM/GENERATIONS](http://WELLSFARGOADVISORS.COM/GENERATIONS) TO DOWNLOAD YOUR FREE COPY.

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC, a registered broker-dealer and non-bank affiliate of Wells Fargo & Company.

Investments and insurance products are:

NOT FDIC-INSURED

NO BANK GUARANTEE

MAY LOSE VALUE

SNAPSHOT  
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# General instructions and disclosures

## About this statement

### Clearing services

Wells Fargo Clearing Services, LLC (Wells Fargo Advisors), an indirect wholly owned subsidiary of Wells Fargo & Company, is a clearing broker-dealer registered with the Securities and Exchange Commission (SEC) and is a member of the New York Stock Exchange (NYSE), the Financial Industry Regulatory Authority (FINRA) and all principal U.S. exchanges. Wells Fargo Advisors carries your account(s) and acts as your custodian for funds and securities deposited with us directly by you, or as a result of transactions we process for your account. Twice a year, Wells Fargo Advisors publishes on its web site [www.wfclearing.com](http://www.wfclearing.com) a statement of the firm's financial condition. Alternatively, a printed statement is available to you upon request.

### Trade date statement

All activity and positions on this statement are shown as of the date a trade is entered on the brokerage trading system (i.e., the trade date). Proceeds from the sale of securities and costs for the purchase of securities are not transacted through your account until the actual settlement date of the trade, which may be up to three business days after the trade date (or longer for certain securities with an extended settlement date).

### Pricing of securities

Securities prices reflected on your statement may vary from actual liquidation value. Prices shown are provided by outside quotation services which we believe to be reliable but due to the nature of market data the accuracy of such prices cannot be guaranteed, or in the absence of such pricing, are estimated by Wells Fargo Advisors using available information and its judgment. Such estimates may not reflect actual trades and do not reflect a commitment by the firm to buy or sell at those prices. Securities listed on a national exchange such as the NYSE or Nasdaq Stock Market are priced as of the close of the statement period. Unlisted shares may be valued at the current best published "bid-price", and, if none exists, the last reported transaction if occurring within the last 45 days. Prices of securities not actively traded may not be available and are indicated by "N/A." Corporate and municipal bonds and other fixed income securities are priced by a computerized pricing service or, for less actively traded issues, by utilizing a yield-based matrix system to arrive at an estimated market value. Listed options are priced based on the closing "bid-ask" prices and the last reported trade. Mutual fund shares are priced at net asset value. Shares of direct participation program (DPP) and real estate investment trust (REIT) securities that are not listed on a national exchange are generally illiquid. Because no formal trading market may exist for these investments, their values are estimated. Unless otherwise indicated, the values shown for DPP and REIT securities have been provided by the management of each program and represent that management's estimate of the investor's interest in the net assets of the program. See statement sections for additional pricing information. Prices for hedge funds and certain managed futures funds are provided on a month delay basis. Other managed futures funds may be priced more frequently. Long-term certificates of deposit (maturity beyond one year from date of issue) are priced using a market value pricing model. Generally, the sale or redemption price of your securities may be higher or lower than the prices shown on your statement. For an actual quote, contact the individual servicing your account.

### Estimated annual income/yield

Estimated Annual Income (EAI), when available, reflects the estimated amount you would earn on a security if your current position and its related income remained constant for a year. Estimated Annual Yield (EAY), when available, reflects the current estimated annual income divided by the current value of the security as of the statement closing date. EAI and EAY are estimates and the actual income and yield might be lower or higher than the estimated amounts. EAY reflects only the income generated by an investment. It does not reflect changes in its price, which may fluctuate. The information used to derive these estimates is obtained from various outside vendors; Wells Fargo Advisors is not responsible for incorrect or missing estimated annual income and yields. Past performance is not a guarantee of future results.

### Income summary

The Income summary displays all income as recorded in the tax system as of period end date. The totals in the Cash flow snapshot may not match the totals in the Income snapshot due to reclassifications or other corrections made in the tax system. Remember, you may have certain products that are not included in these figures and whose income is only available on the tax forms sent to you at year-end. Reclassifications and other tax reporting requirements may alter these numbers both during and after year end. You should rely only on tax reporting documents. Contact your tax advisor if you have any questions about the tax consequences of your brokerage activity.

## About your rights and responsibilities

### Questions and complaints about Your Account

This account statement contains important information about your brokerage account, including recent transactions. All account statements sent to you shall be deemed complete and accurate if not objected to in writing within ten days of receipt. We encourage you to review the details in this statement. If you do not understand any of the information in your statement or if you believe there are any inaccuracies or discrepancies in your statement, you should promptly report them to the manager of the Wells Fargo Advisors office listed on the front of your statement. To further protect your rights, including any rights under the Securities Investor Protection Act, any verbal communications with Wells Fargo Advisors should be re-confirmed in writing. Inquiries or complaints about your account statement, including the positions and balances in your account, may be directed to **Wells Fargo Advisors Client Services at (866) 887-2402 or ATTN: H0005-087, 1 N. Jefferson Ave, St. Louis, MO 63103.**

**Public Disclosure:** You may reach FINRA by calling the FINRA BrokerCheck Hotline at **(800) 289-9999** or by visiting the FINRA website at [www.finra.org](http://www.finra.org). An investor brochure that includes information describing FINRA BrokerCheck is available from FINRA upon request. A brochure describing the FINRA Pricing of Securities Regulation Public Disclosure Program is also available from the FINRA upon request.

### Account Protection

Wells Fargo Advisors is a member of the Securities Investor Protection Corporation (SIPC) which protects against the loss of cash and securities held in client accounts of a SIPC member firm in the event of the member's insolvency and liquidation. SIPC coverage is limited to \$500,000 per customer, including up to \$250,000 for cash. For more information on SIPC coverage, please see the explanatory brochure at [www.sipc.org](http://www.sipc.org) or contact SIPC at **(202) 371-8300**. In addition, Wells Fargo Advisors maintains additional insurance coverage provided by Lexington Insurance Company (Lexington). This additional insurance policy becomes available to clients if their SIPC limit is exhausted and provides additional protection up to a firm aggregate of \$1 billion, including up to \$1.9 million for cash per client. SIPC does not insure the quality of investments or protect against market losses. SIPC only protects the custody function of their members, which means that SIPC works to restore to clients their securities and cash that are in their accounts when the member firm liquidation begins. Not all investments are protected by SIPC. In general, SIPC does not cover instruments such as unregistered investment contracts, unregistered limited partnerships, fixed annuity contracts, escrow receipts, direct investments, currency, commodities or related contracts, hedge funds and certain other investments.

### Investor education

Wells Fargo Advisors publishes on its web site [www.wellsfargoadvisors.com](http://www.wellsfargoadvisors.com) information on topics of interest to investors as well as market commentary and economic analysis. Wells Fargo Advisors has also developed numerous investor education guides to provide you with important information regarding the products and services we offer. These guides may be found under the "Our Insights" tab.

### Free credit balances

Free credit balances are not segregated and may be used by Wells Fargo Advisors in the operation of its business in accordance with applicable laws and regulations. You have the right to receive from us in the course of normal business operations, subject to any open commitments in any of your accounts, any free credit balances to which you are entitled.

### Investment objectives/Risk tolerances

Please inform us promptly of any material change that might affect your investment objectives, risk tolerances or financial situation, or if you wish to impose or change any reasonable restrictions on the management of your account. A copy of the Investment Advisory Services Disclosure document is available without charge upon request. Please contact the individual denoted on the front of your statement to update your information and to receive a copy of this document.

### Tax reporting

We are required by federal law to report annually to you and to the Internal Revenue Service (IRS) on Form(s) 1099 interest income, dividend payments and sales proceeds including cost basis information for applicable transactions credited to your account.



## SNAPSHOT

Page 1 of 7

**NACM-INVESTMENT ACCOUNT C/O  
NATIONAL CENTER FOR STATE COUR**

AUGUST 1, 2017 - AUGUST 31, 2017  
ACCOUNT NUMBER: 5042-8996

### Progress summary

	THIS PERIOD	THIS YEAR
<b>Opening value</b>	<b>\$498,614.96</b>	<b>\$439,903.69</b>
Cash deposited	0.00	0.00
Securities deposited	0.00	0.00
Cash withdrawn	0.00	0.00
Securities withdrawn	0.00	0.00
Change in value	1,842.52	60,553.79
<b>Closing value</b>	<b>\$500,457.48</b>	<b>\$500,457.48</b>

As a Wells Fargo Advisors client, you can upgrade your investment account to add Brokerage Cash Services at no additional cost. Brokerage Cash Services provides access to convenient money movement options including mobile deposit services. It also includes teller deposit services at Wells Fargo branch locations which are provided through a limited purpose Bank account. You'll have access to many more features and benefits to help you manage your finances. It's as simple as talking with Your Financial Advisor. Ask them today about Brokerage Cash Services.

### Portfolio summary

		PREVIOUS		CURRENT		ESTIMATED
ASSET TYPE		VALUE ON JUL 31	%	VALUE ON AUG 31	%	ANN. INCOME
<b>ASSETS</b>	Cash and sweep balances	65.05	0.01	65.05	0.01	0
	Stocks, options & ETFs	0.00	0.00	0.00	0.00	0
	Fixed income securities	0.00	0.00	0.00	0.00	0
	Mutual funds	498,549.91	99.99	500,392.43	99.99	6,314
	<b>Asset value</b>	<b>\$498,614.96</b>	<b>100%</b>	<b>\$500,457.48</b>	<b>100%</b>	<b>\$6,314</b>

# SNAPSHOT

NACM-INVESTMENT ACCOUNT C/O  
NATIONAL CENTER FOR STATE COUR

AUGUST 1, 2017 - AUGUST 31, 2017  
ACCOUNT NUMBER: 5042-8996

## Cash flow summary

	THIS PERIOD	THIS YEAR
<b>Opening value of cash and sweep balances</b>	<b>\$65.05</b>	
Income and distributions	39.02	5,149.69
<b>Net additions to cash</b>	<b>\$39.02</b>	<b>\$5,149.69</b>
Securities purchased	-39.02	-5,149.69
<b>Net subtractions from cash</b>	<b>-\$39.02</b>	<b>-\$5,149.69</b>
<b>Closing value of cash and sweep balances</b>	<b>\$65.05</b>	

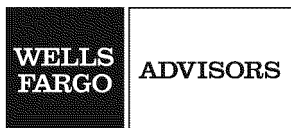
## Income summary \*

	THIS PERIOD	THIS YEAR
<b>TAXABLE</b> Ordinary dividends and ST capital gains	39.02	2,747.71
Long term capital gains	0.00	2,352.25
<b>Total taxable income</b>	<b>\$39.02</b>	<b>\$5,099.96</b>
<b>Total federally tax-exempt income</b>	<b>\$0.00</b>	<b>\$0.00</b>
<b>Total income</b>	<b>\$39.02</b>	<b>\$5,099.96</b>

\* Certain distributions made in the current year are reported as prior year income according to IRS regulations. This may cause a difference between Cash Flow and Income Summary totals.

## Gain/loss summary

	THIS PERIOD REALIZED	THIS YEAR REALIZED
Short term (S)	0.00	0.00
Long term (L)	0.00	0.00
<b>Total</b>	<b>\$0.00</b>	<b>\$0.00</b>



## SNAPSHOT

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NACM-INVESTMENT ACCOUNT C/O  
NATIONAL CENTER FOR STATE COUR

AUGUST 1, 2017 - AUGUST 31, 2017  
ACCOUNT NUMBER: 5042-8996

### Your Financial Advisor

HARGROVE WEALTH MANAGEMENT GROUP 428 MCLAWS CIRCLE STE 100  
OF WELLS FARGO ADVISORS WILLIAMSBURG VA 23185  
Phone: 757-229-7833

Please visit us at: [www.wellsfargoadvisors.com](http://www.wellsfargoadvisors.com)

### Account profile

Full account name:	NACM-INVESTMENT ACCOUNT C/O NATIONAL CENTER FOR STATE COUR
Account type:	Standard Brokerage
Brokerage account number:	5042-8996
Tax status:	Corporate
Investment objective/Risk tolerance:*	AGGRESSIVE GROWTH
Time horizon:*	LONG TERM (10+ YEARS)
Liquidity needs:*	MODERATE
Cost Basis Election:	First in, First out
Sweep option:	BANK DEPOSIT SWEEP

\*For more information, please visit us at: [www.wellsfargoadvisors.com/disclosures](http://www.wellsfargoadvisors.com/disclosures)

### For your consideration

Go paperless. Accessing your account documents online is easy, secure, and costs nothing. Sign on to [wellsfargoadvisors.com](http://wellsfargoadvisors.com) with your Access Online Username and Password, select **Statements & Docs**, and then click on the **Delivery Preferences** Quick Link. Choose **Electronic Delivery** to go paperless or select specific account documents for electronic delivery. If you do not have a Username and Password, visit [wellsfargoadvisors.com/signup](http://wellsfargoadvisors.com/signup) or call 1-877-879-2495 for enrollment assistance.

### Document delivery status

	Paper	Electronic
Statements:	X	
Trade confirmations:	X	
Tax documents:	X	
Shareholder communications:	X	
Other documents:	X	

**NACM-INVESTMENT ACCOUNT C/O  
NATIONAL CENTER FOR STATE COURTS**

AUGUST 1, 2017 - AUGUST 31, 2017  
ACCOUNT NUMBER: 5042-8996

## Portfolio detail

### Cash and Sweep Balances

Sweep Balances - You have the right, in the course of normal business operations, to withdraw balances in the Bank Deposit Sweep or redeem shares of the money market mutual fund used in the sweep, subject to any open commitments in any of your accounts and have the proceeds returned to your accounts or remitted to you. Note, however, that as required by federal banking regulations, the banks in the Bank Deposit Sweep reserve the right to require seven days prior notice before permitting a transfer out of the Bank Deposit Sweep. In addition, the money market mutual funds in the sweep reserve the right to require one or more day's prior notice before permitting withdrawals.

Bank Deposit Sweep - Consists of monies held at Wells Fargo Bank, N.A. and (if amounts exceed \$250,000) at one or more other Wells Fargo affiliated banks. These assets are not covered by SIPC, but are instead eligible for FDIC insurance of up to \$250,000 per depositor, per institution, in accordance with FDIC rules. For additional information on the Bank Deposit Sweep for your account, please contact Your Financial Advisor.

DESCRIPTION	ANNUAL PERCENTAGE YIELD EARNED*	CURRENT MARKET VALUE	ESTIMATED ANNUAL INCOME
BANK DEPOSIT SWEEP	0.00	65.05	0.00
Interest Period 08/01/17 - 08/31/17			
<b>Total Cash and Sweep Balances</b>		<b>\$65.05</b>	<b>\$0.00</b>

\* APYE measures the total amount of the interest paid on an account based on the interest rate and the frequency of the compounding during the interest period. The annual percentage yield earned is expressed as an annualized rate, based on a 365 day year.

### Mutual Funds

If a portion of your fund position was converted, the 'Client Investment' value may include reinvestments from previously held positions.

#### Open End Mutual Funds

Open End Mutual Fund shares are priced at net asset value. Estimated Annual Income and Yield refer to Dividends and Interest Income only, and typically do not reflect Total return.

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
							ANNUAL INCOME	ANNUAL YIELD (%)
AMCAP FUND INC CL A								
AMCPX								
Acquired 11/19/10 nc	1,631.32100	18.39	30,005.00		48,825.43	18,820.43		
Acquired 12/14/10 nc	243.95600	19.11	4,667.00		7,301.60	2,634.60		
Acquired 02/26/14	204.63900	28.43	5,817.90		6,124.84	306.94		
Reinvestments m	752.56900	27.10	20,399.08		22,524.40	2,125.32		
<b>Total</b>	<b>2,832.48500</b>	<b>\$21.50</b>	<b>\$60,888.98</b>	<b>29.9300</b>	<b>\$84,776.27</b>	<b>\$23,887.29</b>	<b>\$339.89</b>	<b>0.40</b>
Client Investment (Excluding Reinvestments)					\$40,489.90			
Gain/Loss on Client Investment (Including Reinvestments)					\$44,286.37			





**NACM-INVESTMENT ACCOUNT C/O  
NATIONAL CENTER FOR STATE COUR**

AUGUST 1, 2017 - AUGUST 31, 2017  
ACCOUNT NUMBER: 5042-8996

## Mutual Funds

### Open End Mutual Funds continued

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
							ANNUAL INCOME	ANNUAL YIELD (%)
AMER MUTUAL FD INC A								
AMRMX								
Acquired 11/19/10 nc	1,175.78500	25.15	29,576.00		46,678.66	17,102.66		
Acquired 12/14/10 nc	177.38300	25.91	4,601.00		7,042.11	2,441.11		
Acquired 02/26/14	168.00200	34.63	5,817.90		6,669.68	851.78		
Reinvestments m	458.08900	33.94	15,548.49		18,186.13	2,637.64		
<b>Total</b>	<b>1,979.25900</b>	<b>\$28.06</b>	<b>\$55,543.39</b>	<b>39.7000</b>	<b>\$78,576.58</b>	<b>\$23,033.19</b>	<b>\$1,543.82</b>	<b>1.96</b>
Client Investment (Excluding Reinvestments)					\$39,994.90			
Gain/Loss on Client Investment (Including Reinvestments)					\$38,581.68			
CAPITAL INCOME BLDR								
CL A								
CAIBX								
Acquired 11/19/10 nc	487.80500	51.25	25,005.00		30,409.76	5,404.76		
Acquired 12/14/10 nc	75.43200	51.49	3,889.00		4,702.43	813.43		
Acquired 02/26/14	99.16300	58.67	5,817.90		6,181.82	363.92		
Reinvestments m	185.87400	55.73	10,360.57		11,587.39	1,226.82		
<b>Total</b>	<b>848.27400</b>	<b>\$53.13</b>	<b>\$45,072.47</b>	<b>62.3400</b>	<b>\$52,881.40</b>	<b>\$7,808.93</b>	<b>\$1,696.54</b>	<b>3.21</b>
Client Investment (Excluding Reinvestments)					\$34,711.90			
Gain/Loss on Client Investment (Including Reinvestments)					\$18,169.50			
CAPITAL WORLD GROWTH & INCOME FD INC CLASS A								
CWGIX								
Acquired 11/19/10 nc	825.53700	36.34	30,005.00		41,474.98	11,469.98		
Acquired 12/14/10 nc	126.89200	36.74	4,667.00		6,375.05	1,708.05		
Acquired 02/26/14	139.76300	45.75	6,394.17		7,021.69	627.52		
Reinvestments m	242.61400	41.93	10,172.97		12,188.93	2,015.96		
<b>Total</b>	<b>1,334.80600</b>	<b>\$38.39</b>	<b>\$51,239.14</b>	<b>50.2400</b>	<b>\$67,060.65</b>	<b>\$15,821.51</b>	<b>\$1,174.62</b>	<b>1.75</b>
Client Investment (Excluding Reinvestments)					\$41,066.17			
Gain/Loss on Client Investment (Including Reinvestments)					\$25,994.48			
EUROPACIFIC GROWTH FD								
CLASS A								
AEPGX								
Acquired 11/19/10 nc	826.05600	42.37	35,005.00		45,152.22	10,147.22		
Acquired 12/14/10 nc	127.01400	42.83	5,445.00		6,942.59	1,497.59		
Acquired 02/26/14	125.67500	49.37	6,204.58		6,869.39	664.81		
Reinvestments m	145.42700	44.95	6,538.29		7,949.04	1,410.75		

**NACM-INVESTMENT ACCOUNT C/O  
NATIONAL CENTER FOR STATE COURTS**

AUGUST 1, 2017 - AUGUST 31, 2017  
ACCOUNT NUMBER: 5042-8996

**Mutual Funds**

**Open End Mutual Funds continued**

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
							ANNUAL INCOME	ANNUAL YIELD (%)
<b>Total</b>	<b>1,224.17200</b>	<b>\$43.45</b>	<b>\$53,192.87</b>	<b>54.6600</b>	<b>\$66,913.24</b>	<b>\$13,720.37</b>	<b>\$837.33</b>	<b>1.25</b>
Client Investment (Excluding Reinvestments)					\$46,654.58			
Gain/Loss on Client Investment (Including Reinvestments)					\$20,258.66			
NEW ECONOMY FUND CL								
SBI CL A								
ANEFX								
Acquired 11/19/10 nc	592.18300	25.33	15,005.00		26,292.92	11,287.92		
Acquired 12/14/10 nc	89.50800	26.02	2,334.00		3,974.16	1,640.16		
Acquired 03/03/14	156.62400	39.40	6,171.00		6,954.10	783.10		
Reinvestments m	246.37900	35.56	8,763.51		10,939.23	2,175.72		
<b>Total</b>	<b>1,084.69400</b>	<b>\$29.75</b>	<b>\$32,273.51</b>	<b>44.4000</b>	<b>\$48,160.41</b>	<b>\$15,886.90</b>	<b>\$103.04</b>	<b>0.21</b>
Client Investment (Excluding Reinvestments)					\$23,510.00			
Gain/Loss on Client Investment (Including Reinvestments)					\$24,650.41			
SMALLCAP WORLD FD A								
SMCWX								
Acquired 11/19/10 nc	649.35100	38.50	25,005.00		35,123.39	10,118.39		
Acquired 12/14/10 nc	97.17300	39.97	3,889.00		5,256.09	1,367.09		
Acquired 03/03/14	122.15000	50.52	6,171.00		6,607.09	436.09		
Reinvestments m	229.36300	44.69	10,250.34		12,406.25	2,155.91		
<b>Total</b>	<b>1,098.03700</b>	<b>\$41.27</b>	<b>\$45,315.34</b>	<b>54.0900</b>	<b>\$59,392.82</b>	<b>\$14,077.48</b>	<b>\$174.58</b>	<b>0.29</b>
Client Investment (Excluding Reinvestments)					\$35,065.00			
Gain/Loss on Client Investment (Including Reinvestments)					\$24,327.82			
SHRT TERM BD FD AMER								
INC SHARES CLASS A								
ASBAX								
Acquired 02/26/14	4,152.35700	10.00	41,523.57		41,399.00	-124.57		
Reinvestments	123.57700	9.97	1,232.74		1,232.06	-0.68		
<b>Total</b>	<b>4,275.93400</b>	<b>\$10.00</b>	<b>\$42,756.31</b>	<b>9.9700</b>	<b>\$42,631.06</b>	<b>-\$125.25</b>	<b>\$444.69</b>	<b>1.04</b>
Client Investment (Excluding Reinvestments)					\$41,523.57			
Gain/Loss on Client Investment (Including Reinvestments)					\$1,107.49			



## NACM-INVESTMENT ACCOUNT C/O NATIONAL CENTER FOR STATE COURTS

AUGUST 1, 2017 - AUGUST 31, 2017  
ACCOUNT NUMBER: 5042-8996

## Mutual Funds

### Open End Mutual Funds continued

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	ADJ COST/ ORIG COST	CURRENT PRICE	CURRENT MARKET VALUE	UNREALIZED GAIN/LOSS	ESTIMATED	
							ANNUAL INCOME	ANNUAL YIELD (%)
<b>Total Open End Mutual Funds</b>			<b>\$386,282.01</b>		<b>\$500,392.43</b>	<b>\$114,110.42</b>	<b>\$6,314.51</b>	<b>1.26</b>
<b>Total Mutual Funds</b>			<b>\$386,282.01</b>		<b>\$500,392.43</b>	<b>\$114,110.42</b>	<b>\$6,314.51</b>	<b>1.26</b>

m This security contains multiple tax lots that may or may not include cost information that is reportable to the IRS.

nc Cost information for this tax lot is not covered by IRS reporting requirements. Unless indicated, cost for all other lots will be reported to the IRS.

## Activity detail

DATE	ACCOUNT TYPE	TRANSACTION	QUANTITY	DESCRIPTION	PRICE	AMOUNT	CASH AND SWEEP BALANCES
08/01				BEGINNING BALANCE			65.05
08/01	Cash	DIVIDEND		SHRT TERM BD FD AMER INC SHARES CLASS A 073117 4,272.01600 AS OF 7/31/17		39.02	
08/01	Cash	REINVEST DIV	3.91800	SHRT TERM BD FD AMER INC SHARES CLASS A REINVEST AT 9.960		-39.02	65.05

## Specific instructions and disclosures

### Income on non-reportable accounts

Your income summary is categorized into taxable and tax-exempt income based upon the securities that you hold. Please be aware that, since this is a 1099 non-reportable account, this income will NOT be reported to the IRS, but is being provided to you for informational purposes only.

### Cost basis - To add or update information or modify your reporting options, please contact Your Financial Advisor.

This statement presents estimated unrealized or realized gains or losses for your information only. If acquisition or other information is not available, the gain/loss information may not be displayed and section and summary totals may not reflect your complete portfolio. Cost basis information is not verified by Wells Fargo Advisors and should not be relied upon for legal or tax purposes. Revisions to this information (due to corporate mergers, tenders and other reorganizations) may be required from time to time.

Cost basis for factored bonds (GNMA, CMO, etc.) will be adjusted for paydown of principal. Systematic investments in mutual funds and reinvested dividends for mutual funds and stocks have been consolidated for each position. Unit cost data for systematic investments and dividend reinvestment securities is provided for informational purposes only and is a non-weighted average.

Your account statement should not be used for tax preparation without assistance from your tax consultant. We do not report capital gains or losses for non-covered securities to the IRS.

### Cost basis options

Unless specific tax lots are selected at trade time, sales of tax lots will occur using the cost basis election reflected in the Account profile section.

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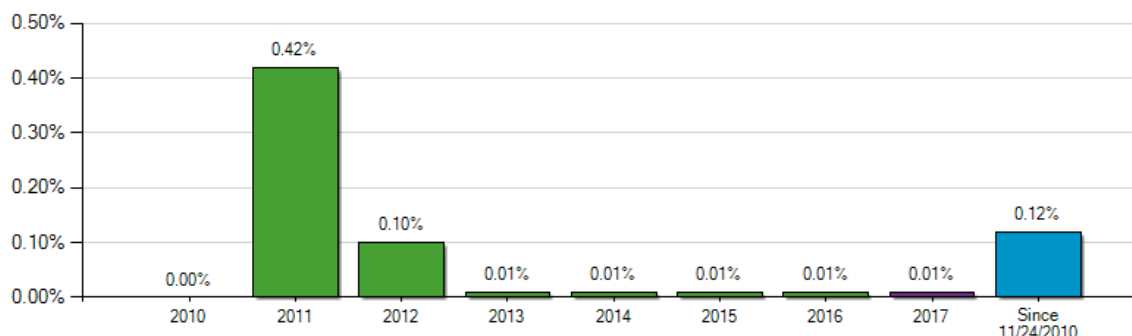
Presented by: HARGROVE WEALTH MANAGEMENT GROUP  
OF WELLS FARGO ADVISORS  
757-229-7833

NACM-CD MONEY MKT AC

XXXX7319

Total assets reported as of August 31, 2017

TRANSACTION BASED



#### Previous Month End Account Performance

Performance Inception Date: Nov 24, 2010

Since Inception Net Money-Weighted ROR: 0.12%

2017 YTD Net Money-Weighted ROR: 0.01%

Beginning Market Value (January 01, 2017): \$12,990

Quarter	Contributions	Withdrawals	Total Net Flows
Jan 1 - Mar 31	0	0	0
Apr 1 - Jun 30	0	0	0
Jul 1 - Aug 31	0	0	0

Total Net Flows: \$0

Invested Capital: \$12,990

Appreciation/Depreciation: \$2

Ending Market Value (August 31, 2017): \$12,992

Average Invested Capital: \$12,990

Beginning Market Value includes Accrued Income of \$0. Ending Market Value includes Accrued Income of \$0. Appreciation/Depreciation includes Income of \$2.

#### Disclaimers

This report is not the official record of your account. However, it has been prepared to assist you with your investment planning and is for informational purposes only. Your Client Statements are the official record of your account. Therefore, if there are any discrepancies between this report and your Client Statement, you should rely on the Client Statement and call your local Branch Manager with any questions. Transactions requiring tax consideration should be reviewed carefully with your accountant or tax advisor. Unless otherwise indicated, market prices/values are the most recent closing prices available at the time of this report, and are subject to change. Prices may not reflect the value at which securities could be sold. Past performance is no guarantee of future results.

Invested capital is your combined market value at the beginning of a stated time period plus total net flows.

Net money-weighted rates of return reflect your decisions to deposit assets to or withdraw assets from your accounts and are calculated after the deduction of program fees. They give more weight to return in periods with higher portfolio values and, as a result, should not be used to measure performance of an investment manager.

Net time-weighted returns are independent of the timing and magnitude of your cash flow decisions and are calculated after the deduction of program fees. Each return period is given an equal weighting, regardless of the portfolio value. They are appropriate for measuring the performance of an investment manager. Comparisons shown on this page may or may not be the comparisons historically or permanently assigned to this portfolio.

Returns greater than one year are annualized. Performance based on current market prices, as available.

Certain assets are excluded from Beginning and Ending Values and are not included in performance calculations. Selected annuities, certain types of direct investments, mutual funds held outside the firm, precious metals, coins, bullion, or any assets subject to tax-withholdings (TEFRA) are among the assets not included in values or performance calculations. For a detailed explanation of the information included within this report, please refer to the Glossary of Terms.

Wells Fargo Advisors is a trade name used by Wells Fargo Clearing Services, LLC.

#### Investment and Insurance Products:

NOT INSURED BY FDIC OR ANY FEDERAL GOVERNMENT AGENCY

MAY LOSE VALUE

NOT A DEPOSIT OF OR GUARANTEED BY A BANK OR ANY BANK AFFILIATE

CAR No.: 0516-02201



### **FY2017 SJI Grant Summary**

Honorarium for Speakers	\$22,875
A/V and WiFi	\$55,993
Streaming/Recording	\$44,700
Speaker Travel	\$10,000
<b>Total</b>	<b>\$133,568</b>

### **FY2018 SJI Grant Proposal**

Honorarium for Speakers*	\$23,000
A/V and WiFi*	\$56,000
Streaming/Recording	\$45,000
Speaker Travel	\$10,000
<b>Webinars*</b>	<b>\$5,000</b>
<b>Website Enhancements*</b>	<b>\$5,000</b>
<b>Guide*</b>	<b>\$6,000</b>
<b>Total</b>	<b>\$150,000</b>

#### **\*Notes for FY2018**

- Broaden use of honorarium to cover lost speaker registration fees
- Adjust percent of A/V cost distribution?
- Four (4) webinars per year – all recorded and posted on website
- Website enhancements for retrieval of recorded webinars, presentations and docs – possibly include Core website?
- Possible guide if topic is in sync with SJI priorities?

### NACM Revenue/Expenses by Category

Governance Q1000.0000; Q4000.0000; Q4800.0000		
<b>REVENUE - GENERAL OPERATIONS</b>		
Donations	A405-02	Q1000.0000
In-Kind Contrib.-NCSC	A405-06	Q1000.0000
Scholarship Fd	A405-05	Q1000.0000 - Gallas scholarship
Interest Income	A410-01	Q1000.0000
Invest Gains/Losses	A415-01	Q1000.0000
Misc. Income	A495-01	Q1000.0000
Drawdown from Investment Account		
		<b>Governance Revenue Total</b>
<b>EXPENSES - GENERAL OPERATIONS</b>		
Travel President	A510-01	Q1000.0000
Travel Officer	A510-04	Q1000.0000
Travel Site Visit	A510-06	Q1000.0000
Travel Assoc Svcs	A510-08	Q1000.0000
Pres Discretionary	A522-01	Q1000.0000
Committee Exp	A525-01	Q1000.0000
Telephone	A530-01	Q1000.0000
Webinars	A532-01	Q1000.0000
Postage/Freight	A535-01	Q1000.0000
Printing/Copying/Layout	A540-01	Q1000.0000
Office Supplies	A545-01	Q1000.0000
Credit Card Fees	A550-01	Q1000.0000
Licenses & Fees	A555-01	Q1000.0000
Liability/D&O Ins	A560-01	Q1000.0000
Scholarships	A565-01	Q1000.0000 Graduate, Gallas & ICM
Admin/Contract Fee	A575-01	Q1000.0000
Grant Match- Admin/Contr	A577-07	Q1000.0000
Audit Fees/Tax Prep	A580-01	Q1000.0000
		<b>General Expense Total</b>
<b>EXPENSES - BOARD MTGS</b>		
Travel - General	A510-00	Q4000.0000
Food & Beverage	A518-01	Q4000.0000
Audio-Visual / Internet	A528-01	Q4000.0000
<b>REVENUE - SPECIAL PROJECT FUND (fundraising)</b>		
Scholarship Fund	A405-05	Q4800.0000
		<b>Scholarship Revenue Total</b>
<b>EXPENSES</b>		
Scholarships	A565-01	Q4800.0000
		<b>Scholarship Expense Total</b>
<b>Total Governance</b>		

2018		
Budget Revenue	Budget Expenses	Budget Net
0.00		
90,000.00		90,000.00
1,500.00		1,500.00
0.00		0.00
0.00		0.00
0.00		0.00
50,000.00		50,000.00
141,500.00		
	20,000.00	-20,000.00
	1,500.00	-1,500.00
	4,000.00	-4,000.00
	2,500.00	-2,500.00
	2,500.00	-2,500.00
	1,200.00	-1,200.00
	4,200.00	-4,200.00
	1,600.00	-1,600.00
	500.00	-500.00
	500.00	-500.00
	200.00	-200.00
	15,000.00	-15,000.00
	45.00	-45.00
	5,500.00	-5,500.00
	3,000.00	-3,000.00
	376,983.50	-376,983.50
	66,526.50	-66,526.50
	1,500.00	-1,500.00
	507,255.00	-507,255.00
	45,000.00	-45,000.00
	10,000.00	-10,000.00
	2,500.00	-2,500.00
	57,500.00	-57,500.00
5,000.00		5,000.00
5,000.00		
	5,000.00	-5,000.00
	5,000.00	-5,000.00
146,500.00	569,755.00	-423,255.00

[illegible]

## NACM Revenue/Expenses by Category

Conferences- Q2000 (Annual)

### ANNUAL CONFERENCE

#### REVENUE

Fees & Registrations	A420-01	Q2000.3000 - AC Events
Social/Other Income	A425-01	Q2000.3000 - AC Events
Vendor Income	A430-01	Q2000.4000- AC Vendors
Sponsorship Income	A435-01	Q2000.4000- AC Vendors
SJI Grant	A440-01	Q6018.2000 - SJI - Annual Conf. 2018
<b>AC Revenue Total</b>		

#### EXPENSES

Consultant - Live Streamin	A500-01	Q6018.2000 - SJI - Annual Conf. 2018
Travel - Gen.	A510-00	Q2000.3000- AC Events Q6018.2000 - SJI - Annual Conf. 2018
Honoraria	A514-01	Q6018.2000 - SJI - Annual Conf. 2018
Audio Visual/Internet	A516-01	Q2000.4000 - AC Vendors Q6018.2000 - SJI - Annual Conf. 2018
Food & Beverage	A518-01	Q2000.3000- AC Events
Conference Exps.	A520-01	Q2000.3000 - AC Events Q2000.4000 - AC Vendors
Postage/Freight	A535-01	Q2000.3000- AC Events
Printing/Copying/Layout	A540-01	Q2000.3000 - AC Events Q2000.4000 - AC Vendors

2018		
Budget Revenue	Budget Expenses	Budget Net
263,250.00		263,250.00
8,000.00		8,000.00
175,000.00		175,000.00
55,000.00		55,000.00
94,500.00		94,500.00
595,750.00		595,750.00
	29,500.00	-29,500.00
	29,500.00	-29,500.00
	10,000.00	-10,000.00
	12,500.00	-12,500.00
	22,500.00	-22,500.00
	15,000.00	-15,000.00
	15,000.00	-15,000.00
	0.00	0.00
	37,500.00	-37,500.00
	37,500.00	-37,500.00
	175,000.00	-175,000.00
	175,000.00	-175,000.00
	120,000.00	-120,000.00
	9,500.00	-9,500.00
	129,500.00	-129,500.00
	2,000.00	-2,000.00
	2,000.00	-2,000.00
	0.00	0.00
	100.00	-100.00
	100.00	-100.00

2018		
Actual Revenue	Actual Expenses	Actual Net
0.00		0.00
	0.00	0.00
		0.00
	0.00	0.00
	0.00	0.00
	0.00	0.00
	0.00	0.00
	0.00	0.00
	0.00	0.00
	0.00	0.00
	0.00	0.00
	0.00	0.00
	0.00	0.00
	0.00	0.00
	0.00	0.00
	0.00	0.00
	0.00	0.00
	0.00	0.00
	0.00	0.00



NACM Revenue/Expenses by Category

ANNUAL CONFERENCE

EXPENSES (cont.)		
Licenses & Fees	A555-01	Q2000.2000-AC Planning
Insurance Expense	A560-01	Q2000.2000- AC Planning
Grant Match- Travel	A577-01	Q2000.1000 AC Education
Grant Match - Honorarium	A577-02	Q2000.1000 AC Education
Grant Match - AV	A577-03	Q2000.1000 AC Education
Awards / Gifts	A585-02	Q2000.3000 AC Events
AC Expense Total		
Total Annual Conference		

2018		
Budget Revenue	Budget Expenses	Budget Net
	125.00	-125.00
	2,000.00	-2,000.00
	12,500.00	-12,500.00
	5,000.00	-5,000.00
	37,500.00	-37,500.00
	2,200.00	-2,200.00
	59,325.00	-59,325.00
	470,425.00	-470,425.00
595,750.00	470,425.00	125,325.00

2018		
Actual Revenue	Actual Expenses	Actual Net
		0.00
		0.00
		0.00
		0.00
		0.00
		0.00
	0.00	0.00
	0.00	0.00
0.00	0.00	0.00

## NACM Revenue/Expenses by Category

Conferences- Q3000 (Midyear)			
MIDYEAR CONFERENCE REVENUE			
Fees & Registrations	A420-01	Q3000.3000- MC Events	
Social/Other Income	A425-01	Q3000.3000- MC Events	
Vendor Income	A430-01	Q3000.4000 - MC Vendors	
Sponsorship Income	A435-01	Q3000.4000 - MC Vendors	
SJI Grant	A440-01	Q6018.3000 -SJI Midyear Conf. 2018	
		<b>MY Revenue Total</b>	
EXPENSES			
Consultant - Live Streamin	A500-01	Q6018.3000 -SJI Midyear Conf. 2018	
Travel - Gen.	A510-00	Q3000.3000- MC Events	
		Q6018.3000 -SJI Midyear Conf. 2018	
Honoraria	A514-01	Q6018.3000 -SJI Midyear Conf. 2018	
Audio Visual/Internet	A516-01	Q3000.4000 - MC Vendors	
		Q6018.3000 -SJI Midyear Conf. 2018	
Food & Beverage	A518-01	Q3000.3000- MC Events	
Conference Exps.	A520-01	Q3000.3000 - MC Events	
		Q3000.4000 - MC Vendors	
Postage/Freight	A535-01	Q3000.3000-MC Events	
Printing/Copying/Layout	A540-01	Q3000.4000- MC Vendors	
Insurance Expense	A560-01	Q3000.2000 - MC Planning	
Grant Match- Travel	A577-01	Q3000.1000 MC Education	
Grant Match - Honorarium	A577-02	Q3000.1000 MC Education	
Grant Match - AV	A577-03	Q3000.1000 MC Education	
Other Expenses	A595-01	Q3000.3000 - MC Events/Rental	
		<b>MY Expense Total</b>	
		<b>Total Midyear Conference</b>	

2018		
Budget Revenue	Budget Expenses	Budget Net
76,000.00		76,000.00
300.00		300.00
50,000.00		50,000.00
15,000.00		15,000.00
50,800.00		50,800.00
192,100.00		192,100.00
	20,800.00	-20,800.00
	20,800.00	-20,800.00
	7,500.00	-7,500.00
	4,000.00	-4,000.00
	11,500.00	-11,500.00
	6,000.00	-6,000.00
	6,000.00	-6,000.00
	150.00	-150.00
	20,000.00	-20,000.00
	20,150.00	-20,150.00
	53,000.00	-53,000.00
	53,000.00	-53,000.00
	5,000.00	-5,000.00
	3,500.00	-3,500.00
	8,500.00	-8,500.00
	1,500.00	-1,500.00
	100.00	-100.00
	500.00	-500.00
	4,000.00	-4,000.00
	2,000.00	-2,000.00
	20,000.00	-20,000.00
	0.00	0.00
	28,100.00	-28,100.00
	148,050.00	-148,050.00
192,100.00	148,050.00	44,050.00

2018		
Actual Revenue	Actual Expenses	Actual Net
		0.00
		0.00
		0.00
		0.00
		0.00
0.00		0.00
	0.00	0.00
	0.00	0.00
		0.00
		0.00
	0.00	0.00
		0.00
		0.00
	0.00	0.00
		0.00
		0.00
	0.00	0.00
0.00	0.00	0.00

### NACM Revenue/Expenses by Category

Publications - Q4200.0000/Q4200.6014/4200.2000/Q4200.3000

## REVENUE

Grant Income	A440-01	Q6018.4200 - SJI Grant 2018
Advertising Income	A450-01	Q4200.1000 - Court Manager
		Q4200.2000 - Court Express
		Q4200.3000 - Website
		<b>Publication Revenue Total</b>

## EXPENSES

Consultant	A500-01	Q4200.3000 - Website
Postage/Freight	A535-01	Q4200.1000 - Court Manager
Printing/Copying/Layout	A540-01	Q4200.1000 - Court Manager
	A540-01	Q4200.2000 - Court Express
	A540-01	Q6018.4200 - SJJ Grant 2018
Grant Match - Consultant	A577-00	Q4200.3000 - Website

**Publication Expense Total**  
**Total Publications**

Membership - Q4400.0000

## REVENUE

Mbrshp. Dues-Reg.	A400-01	Q4400.0000
Mbrshp. Dues-Assoc.	A400-02	Q4400.0000
Mbrshp. Dues-Sustaining	A400-03	Q4400.0000
Mbrshp. Dues-Retired	A400-04	Q4400.0000
Mbrshp. Dues-Student	A400-07	Q4400.0000
		<b>Membership Revenue Total</b>

## EXPENSES

Postage/Freight	A535-01	Q4400.0000
Printing/Copying/Layout	A540-01	Q4400.0000
Office Supplies/Expenses	A545-01	Q4400.0000
Linkedin Campaign	A548-01	Q4400.0000

**Membership Expense Total**  
**Total Membership**

Guides- Q5000.0000/Q5000.6013/Q5000.6014

## REVENUE

Grant Income	A440-01	Q6018.5000 - SJI Grant (2018)
Publication Sales	A460-01	Q5000.0000 - Guides
		<b>Guide Revenue Total</b>

## EXPENSES

Postage/Freight	A535-01	Q5000.0000 - Guides
Printing/Copying/Layout	A540-01	Q5000.0000 - Guides
<b>Total Guides</b>		<b>Guide Expense Total</b>

## Total Guides

TOTAL REVENUE	\$1,148,695.00		\$0.00	
TOTAL EXPENSES		\$1,273,080.00		\$0.00
TOTAL INCOME(LOSS)			-\$124,385.00	\$0.00



**FY2018 Budget Summary**

Total Revenue	\$1,148,695
Total Expenses	1,273,080
<b>Surplus/(Deficit)</b>	<b>(\$124,385)</b>
Investment Funds	\$12,989
Bank Account Rollover	TBD
Cuts/Revenue for "Safety"	\$30,000
<b>Adjusted Budget</b>	<b>(\$TBD)</b>

**2012-2017 Budget Summary**

December 31 <sup>st</sup> Cash On-Hand Avg	\$140,487
Net Gain/(Loss) of Members	(7)
Paid Conference Attendance Avg.	648 (range of 424 to 918)
Budget Surplus/(Deficit)	\$14,473
Conference City Cost Index Avg.	13%
National Inflation Avg .	1.45%

**Budget Takeaway**

**Recruit! – Retain! – Engage!**

**Expense Reduction Options**

- Eliminate Leadership Seminar \$4,000~
- Eliminate Past Presidents Midyear registration subsidy \$4,750 (for each 10)
- Eliminate Past Presidents Annual registration subsidy \$5,850 (for each 10)
- Eliminate Board Midyear registration subsidy (15) \$7,125+
- Eliminate Board Annual registration subsidy (15) \$8,775
- Eliminate Fall Board Meeting \$12,000
- Eliminate Midyear Board Airfare \$7,500
- Eliminate in-person Officer meetings \$2,600
- Eliminate non-Officer lodging at annual \$3,500
- Reduce # of Comp Registrations for Midyear \$4,750 (for each 10)
- Reduce # of Comp Registrations for Midyear \$5,850 (for each 10)
- Reduce Food/M meal options at conferences UNK (breakfast already removed)
- **Eliminate professional photographer \$2,500**
- Reduce scope of social events \$10-25,000 (less cost if on-site?)
- **Eliminate A/V at Board meetings \$2,500**
- Eliminate printed *Court Manager* \$20,000 (1 edition)
- Eliminate *Linked In* campaign \$4,000
- Require assessment of conference site location costs \$4,000~ for every 1%

## Revenue Enhancement Options

✓ Increase Membership	\$1,250 (for every 10 new memberships)
✓ Increase Membership Dues	\$14,750 (for each \$10 increase)
✓ Increase Student Membership	\$350 (every 10 students)
✓ Convert eMembers to Full Members	\$15,210
✓ Remove New membership \$15 discount	\$4,400
✓ Increase Midyear registration fee from \$475 for 160 ppl	\$4,000 (for each \$25 increase)
✓ Increase Annual registration fee from \$585 for 450 ppl	\$11,250 (for each \$25 increase)
✓ <b>Officer/Board voluntary midyear registration fees</b>	<b>\$4,750 (for each 10)</b>
✓ <b>Officer/Board voluntary annual registration fees</b>	<b>\$5,850 (for each 10)</b>
✓ Increase Midyear attendees	\$1,900 (net \$ each 10 additional attendees)
✓ Increase Annual attendees	\$2,663 (net \$ each 10 additional attendees)
✓ Electronic Court Manager Advertising Rates	\$1-5,000~ (very unknown, needs review)
✓ Recoup Speaker Registrations in SJI Grant for Midyear	\$4,750 (for each 10)
✓ Recoup Speaker Registrations in SJI Grant for Annual	\$5,850 (for each 10)
✓ Increase Exhibitor Rates	UNK (already high, may lose exhibitors)
✓ <b>Sponsored Sessions at Conferences</b>	<b>\$10,000-\$20,000</b>
✓ <b>Sponsored Events at Conferences</b>	<b>\$5,000+</b>
✓ Shorten time for early bird	UNK (for each \$50, already moved?)
<del>✓ Eliminate credit card discount</del>	<del>\$3,750</del>
✓ Eliminate multi-year discount (\$15/year)	\$1,020 (68 multi-year members)
✓ Transfer Investment Account Dividends to Operating	\$3,500~ (for each % of growth, avg is 7%)

## Pending Board Items Under Review that Could Impact Budget

• Free memberships to all COSCA members	\$5,000+
• Reduction/Conversion of eMembers	UNK
• Non-Renewal of Dual Membership Agreements	\$8,000 (only 80 members noted)
• Badge Printers at Conferences	\$2,500/\$7,500 (midyear); \$3,500/\$13,500 (annual)



**Committee Progress Report Form – 2017-2018**  
**Committee: Communications**

	Report	Due Date	Submission Date
<b>X</b>	<b>Fall Progress Report</b>	<b>September 5, 2017</b>	8/31/17
	Midyear Progress Report	January 16, 2018	
	Annual Progress Report	June 20, 2018	

Project	Project Status	Strategic Priority? (Yes/No)	Discussion Needed? (Yes/No)	Board Action Needed? (Yes/No)	If Yes to discussion or action, please describe what needed
CM Ad Rates	Court Manager Advertising Rates for 2018	No	Yes	Yes	Must determine 2018 advertisement rates.
Elect CM	Winter 2017/2018 edition of the electronic CM. Magazine drops January 7. Articles due by September 25. Tasha Ruth has taken over as Editor.	Yes	Yes	Yes	Must determine placement for electronic CM – Members only or public side. Review Mellen Street proposal.
Paper CM	The paper edition of CM in 2018 will not contain session reports. Need to determine what will be included	Yes	Yes	Yes	Must determine if still a conference edition. Who will write articles? Will a State of the Profession be included?
Guide	2018 Guide	Yes	Yes	Yes	Must determine Guide topic.
Webinar	First webinar of 2018.	Yes	Yes	Yes	Must determine topic for first webinar.

Project	Project Status	Strategic Priority? (Yes/No)	Discussion Needed? (Yes/No)	Board Action Needed? (Yes/No)	If Yes to discussion or action, please describe what needed
2017 Webinars	The 3 <sup>rd</sup> Webinar- The Court Administrator Guide will be held September 22, 2pm Eastern. The 4 <sup>th</sup> Webinar – Plain Language is being planned and will be scheduled for November 29, 2017, 2pm Eastern.	Yes	No	No	
Court Express	Jeffrey Tsunekawa has taken over as Editor. Next Court Express will come out in November. Articles due to Jeffrey by November 10.	Yes	No	No	
Website Redesign	Proposals for website redesign have been sought.	Yes	Yes	Yes	Must discuss website redesign proposals and determine which proposal and which aspects of the proposal should be accepted.

**Time needed at meeting for Committee report:**

**Submitted by: Dawn Palermo**

**Date: 8/31/17**



## Court Manager

THE QUARTERLY JOURNAL OF THE NATIONAL ASSOCIATION FOR COURT MANAGEMENT

RATE CARD FOR 2017

### Publisher

National Association for Court Management

### Circulation

Distributed quarterly to nearly 1,800 court managers, administrators, clerks, and other court personnel.

### *Court Manager* Rates\*

\*\*All rates include placement in the digital format of the publication

Full page	\$547.50	(black and white)
Half page	\$465	(black and white)
Back cover	\$721.50	(color) - <b>Unavailable</b>
Inside covers	\$866.50	(color) - <b>Unavailable</b>

Advertisers who agree, by contract, to advertise in four issues of *Court Manager* will be granted a 6% discount. This discount is not applicable to cover or color ads.

### Mechanical requirements

- Trim size is 7 ½" x 10"
- Half-page size should be built 7 ½" x 4 ½"
- Back cover should be built 6 x 8 ¼, four color
- 150 line screen
- Printing is offset, black and white plus one, with four-color covers
- Advertiser to furnish an EPS formatted (CD), Quark 4.1 (CD), 300 dpi (all parts) PDF, or via FTP

To advertise, call or email:

Denise Bridges, Advertising Representative  
***Court Manager***  
c/o National Center for State Courts  
300 Newport Avenue  
Williamsburg, VA 23185-4147  
[dbridges@ncsc.org](mailto:dbridges@ncsc.org)  
(757) 259-1837

\* A 2% charge will be assessed for late payments.





## Court Manager

THE QUARTERLY JOURNAL OF THE NATIONAL ASSOCIATION FOR COURT MANAGEMENT

### RATE CARD FOR WINTER *COURT MANAGER* VOL. 32/4

**Publisher:** National Association for Court Management

**Circulation:** Distributed quarterly to nearly 1,800 court managers, administrators, and clerks. Seeking advertisers for the Winter issue of the *Court Manager* (to be launched January 2018) which will be the inaugural Electronic Edition.

#### ***Court Manager Rates\****

(All rates include placement on the home page of the digital publication, unless otherwise noted)

#### **On Court Manager Home Page**

Side Bar Ad – static <i>1 available</i>	\$550	300 x 600 pixels, color, click through capability, ad on the right side of screen alongside content, Static Image. Logo with click-through also included in email to ALL members announcing the publication is ready to be viewed
Side Bar Ad – animated <i>1 available</i>	\$575	300 x 600 pixels, color, click through capability, ad on the right side of screen alongside content, 10 seconds, 3x loops max, no flash for tablet, max size 40 KB. Static Logo with click-through also included in email to ALL members announcing the publication is ready to be viewed
Lower Billboard Ad – static <i>1 available in this space – <b>either</b> static or animated</i>	\$725	970 x 250 pixels, color, click through capability, static. Static Logo with click-through also included in email to ALL members announcing the publication is ready to be viewed
Lower Billboard Ad – animated <i>1 available in this space – <b>either</b> static or animated</i>	\$750	970 x 250 pixels, color, click through capability, 10 seconds, 3x loops max, no flash for tablet, max size 40KB. Static Logo with click-through also included in email to ALL members announcing the publication is ready to be viewed
Upper Billboard Ad <i>1 available</i>	\$865	970 x 250 pixels, color, click through capability, top of eMagazine Home page under Masthead, static. Static Logo with click-through also included in email to ALL members announcing the publication is ready to be viewed

### Inside Ad Rates (ad on page with featured article content)

Side Bar – static <i>1 available</i>	\$250	300 x 600 pixels, color, click through capability, ad on the right side of screen alongside content, Static Image. Static Logo with click-through also included in email to ALL members announcing the publication is ready to be viewed
Billboard – static <i>1 available</i>	\$350	970 x 250 pixels, color, click through capability, ad on the bottom of screen under article. Static Logo with click-through also included in email to ALL members announcing the publication is ready to be viewed

### Splash Page

Splash Page Ad (when user clicks to see publication) <i>1 available</i>	\$1,000	970 x 500 pixels, color, click through capability, static, flashes up between user click and document loading. Logo with click-through also included in email to ALL members announcing the publication is ready to be viewed.
--	---------	--

\* A 2% charge will be assessed for late payments.

For this inaugural issue, purchase your add **prior to October 1** and receive a 10% discount on published ad rates.

2018 rates for the Court Manager will be released November 2017 for the entire year, which will include 3 ePublications and 1 Print Version (annual conference follow-up).

<b>Winter 2017 Vol. 32/4</b>	Ad space reservation/ ad submission deadline	Video Deadline	eMagazine Launches
Ad space reservation/ ad submission deadline	October 30	Minimum 7 days before launch	January 7

To advertise, call or email:

Stacey Smith  
***Court Manager***  
c/o National Center for State Courts  
300 Newport Avenue  
Williamsburg, VA 23185-4147  
(757) 259-1816 [ssmith@ncsc.org](mailto:ssmith@ncsc.org)

# Advertising Rates for Journals

## Paper

Colored						Black & White				
Journal	1 page	2/3 page	1/2 page	1/3 page	1/4 page	1 page	2/3 page	1/2 page	1/3 page	1/4 page
NACM Court Manager						\$547.50		\$465.00		
TACA	\$500		\$300		\$200					
Courts Today	\$3,240.00	\$2,860.00	\$2,600.00	\$2,530.00	\$2,240.00	\$1,900.00	\$1,520.00	\$1,340.00	\$1,200.00	\$1,000.00
ABA	Negotiable									
SHRM	Negotiable									
GFOA	\$3,390.00	\$3,035.00	\$2,980.00	\$2,890.00	\$2,625.00	\$1,505.00	\$1,080.00	\$1,030.00	\$905.00	\$780.00
LA Bar Association						\$1,085.00	\$800.00	\$650.00		\$330.00
NACM Back Cover	\$721.50					* TACA gives a discount if advertise in 3 issues (\$1200, \$750, \$450)				
NACM Inside Cover	\$866.50									

## Electronic Journal

Journal	Colored				
	Per Issue	3 issues	Discount		
NACM Court Manager					
Federal Court Clerks' Assn			10% discount		2 electronic and 1 print issue
Half Page	\$396.00	\$1,188.00	\$1,069.00		
Full Page	\$594.00	\$1,782.00	\$1,604.00		
Inside Front Cover	\$792.00	\$2,376.00	\$2,138.00		
Inside Back Cover	\$792.00	\$2,376.00	\$2,138.00		
IACA					
Half Page	\$400.00				Journal Sustaining Sponsorships
2 Half Pages	\$700.00			Facing or Separate	various discounts
Single Full Page	\$650.00				
Two Full Pages in an issue	\$1,000.00			Facing or Separate	
Courts Today					
Half Page	\$2,600.00	\$2,495.00			Other Options
Full Page	\$3,420.00	\$3,050.00			
Cover	\$4,500.00				

# Advertising Rates for Journals

<b>MAACM</b>						
Full Page	\$250.00					
Half Page	\$175.00					
Quarter Page	\$100.00					
<b>Accounting Education News</b>						8600 members
Full Page	\$1,400.00					
Half Page	\$800.00					
Back Cover	\$1,500.00					
<b>Mgt. Accounting Research</b>						2,000 subscriptions
Full Page	\$400.00					
Half Page	\$300.00					
Cover	\$500.00					
<b>Inter. Accounting Research</b>						1,300 subscriptions
Full Page	\$400.00					
Half Page	\$300.00					
Cover	\$500.00					
<b>Accounting Horizons</b>						5,500 members
Full Page	\$800.00					
Half Page	\$550.00					
Cover	\$850.00					

## Recommendation

Full Page	\$400.00
Half Page	\$300.00
Cover	\$500.00



# MELLEN STREET CREATIVE

9 east mellen street, hampton, virginia 23663

tel 757.723.7717  
fax 757.723.7799  
contact@mellenst.com

**Client Estimate: 031-17**

DATE: May 12, 2017

TO: NCSC  
Chuck Campbell

RE: Court Manager e-zine and Printed Issue

1. E-zine Scope:

Convert the printed Court Manager magazine to an online format with three editions each year. Readers will scroll through the articles vertically and articles can feature as many live links as needed. A search bar will be placed in the header where readers can type keywords to more quickly identify topics of interest. These keywords will be supplied by NCSC when the copy is submitted. A searchable archive will be included in the development of the site and can accommodate as many years as NCSC requests. These initial archives for the previous 5 or more years will be posted as flip books. The impact of cost moving forward will be the amount of server space needed to save these archived and searchable files, as there might be a slight increase in the hosting fees over time. Mellen Street Creative will maintain these archives within the website hosted through NCSC.

Within the scope Mellen Street Creative proposes to continue to identify supportive photography and pull quotes. The online format can follow the current variations of Court Manager, expanding and contracting as needed. There are a multitude of options for ad size and placement from banners between features on the home page, ads within feature and department copy to overlays and placement in the side bars as well as live video content. Text can hyperlink, videos can be embedded and photo galleries can be created.

As noted, the issues can be archived and made accessible anytime on the site. The site will be responsive and format to optimal viewing on the device being used.

Please find a rough mock up for review. The header has complete navigation and information pertaining to the volume displaying. The top of the home page could display what's "In This Issue." Ad space can be positioned to provide visual breaks between major sections. Features can be horizontal in orientation allowing for ease of expanding and contracting as the number of features change from issue to issue. Imagery can display the full width of each bar or can be scaled back to allow for white space. Departments can be added to the home page if desired. Content will be searchable and a right bar box will be visible listing current titles as well as archived titles/issues.

As the visitor selects an article to read there is an opportunity for overlay ads to display. Overlay ads are considered premium because the visitor is forced to interact with the ad for a predetermined amount of time before they can get to the desired content. Once on the article page, pull quotes can be identified to break up content, ads can be placed, charts inserted, etc.

Online First Issue

Concept to launch of the new site will take approximately 8 – 12 weeks  
\$7200

Subsequent online issues

Approximately 1 week to update the site with images, content, links, videos, etc.  
\$2500

Total first year investment e-zine \$12,200  
Stock photography as needed \$45/ea image



# MELLEN STREET CREATIVE

tel 757.723.7717  
fax 757.723.7799  
contact@mellenst.com

---

9 east mellen street, hampton, virginia 23663

2. Print Addition Scope:

Mellen Street Creative will provide design and layout of one issue of Court Manager. Design includes the identification of supportive photography and pull quotes. All provided photography is edited by Mellen Street Creative before being placed in layout and all photography is archived.

Design/Layout \$2900

Stock photography as needed \$45/ea image





IN THIS ISSUE

- It's Time to Expand the Traditional "Purposes of Courts"
- Interpreter Compensation in the Courts
- The Community Emergency Response Team
- Understanding the Joint Technology Committee
- Leadership Pathways

AD SPACE

FEATURES

It's Time to Expand the Traditional "Purposes of Courts"

Kent Batty

Read the Full Article

Interpreter Compensation in the Courts: A Descriptive Study

Robert Joe Lee and Francis W. Hoeber

Read the Full Article

The Community Emergency Response Team and Bringing Hands-on Emergency Preparedness to the Courthouse

Justin Mammen

Read the Full Article

AD SPACE

DEPARTMENTS



President's Message  
Scott Gault



Editor's Notes  
Phillip Knox



Courtside Conversation  
Renee Dancy



Jury News  
Paula Hannaford Agor and Greg Hurley



A Question of Ethics  
Peter Keller



Management Musings  
Giuseppe M. Fazzari

- IJIS Exchange
- New Members
- Sustaining Members
- 2016-2017 Board of Directors

National Association for Court Management

The National Association for Court Management is a nonprofit organization dedicated to improving the quality of judicial administration at all levels of courts nationwide. In carrying out its purpose, the association strives to provide its members with professional education and to encourage the exchange of useful information among them; encourages the application of modern management techniques to courts; and, through the work of its committees, supports research and development in the field of court management, the independence of the judicial branch, and the impartial administration of the courts.

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# It’s Time to Expand the Traditional “Purposes of Courts”

Kent Batty

For more than 45 years, Dean Ernest Friesen has focused his considerable intellect and years of experience on the purposes of courts. Beginning in the early 1970s, in classes on court administration that he taught at the National Judicial College, he asked countless groups of judges and administrators what they thought the courts’ principal purposes were. Over time he developed eight simple statements that remind all of us involved in the courts what our foundational principles are. I believe Friesen did so because he felt it was of utmost importance that those who work in and with courts understand as clearly as possible the importance of the work of the courts and their role in society.

By now, the number of people exposed to these purposes must be in the hundreds of thousands. And certainly hundreds, if not thousands, of people in the field are using them as teaching devices. Friesen and many others like us hope that court leaders are using them routinely, at a minimum to explain the courts to the public, to support court programs, and to help justify court budgets to funding authorities.

“Friesen’s Purposes,” as many of us routinely refer to them, have been part of the lexicon of court administration since he first began promulgating them in the mid-1970s. Lo, these many years later, they still encapsulate quite well the basic roles or responsibilities of courts in today’s society:

1. To do individual justice in individual cases
2. To appear to do justice in individual cases
3. To provide a final (previously, “a forum for the”) resolution of legal disputes
4. To protect against the arbitrary use of government power
5. To make a formal record of legal status
6. To deter criminal behavior
7. To help rehabilitate persons convicted of crime
8. To separate persons convicted of serious offenses from society.

AD SPACE

While this list continues to serve us well, the time has come to consider whether new purposes should be added to it. Indeed, the National Center for State Courts, in its Institute for Court Management course “Visioning and Strategic Planning,” lists Friesen’s purposes as “Results of Effective Performance” and then adds its own short list of additional results. It is also likely that, across the country, faculty who teach ICM’s “Purposes and Responsibilities of Courts” class have done their own embellishing of the original purposes as they fielded questions from participants and otherwise thought through the broadened roles courts perform today. Undoubtedly, many others working in the courts have thought the purposes could benefit from a review.

Premium  
AD  
SPACE

## Features

- [Feature Article 01](#)
- [Feature Article 02](#)
- [Feature Article 03](#)
- [Feature Article 04](#)
- [Feature Article 05](#)

## Archives

- [Volume 32.1](#)
- [Volume 31.4](#)
- [Volume 31.3](#)
- [Volume 31.2](#)
- [Volume 31.1](#)

AD  
SPACE

AD  
SPACE

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### National Association for Court Management

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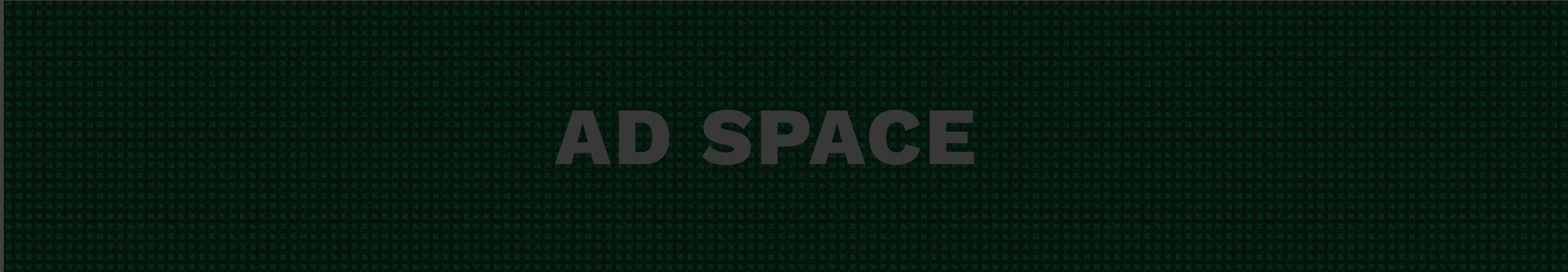
# Premium Timed Overlay AD SPACE

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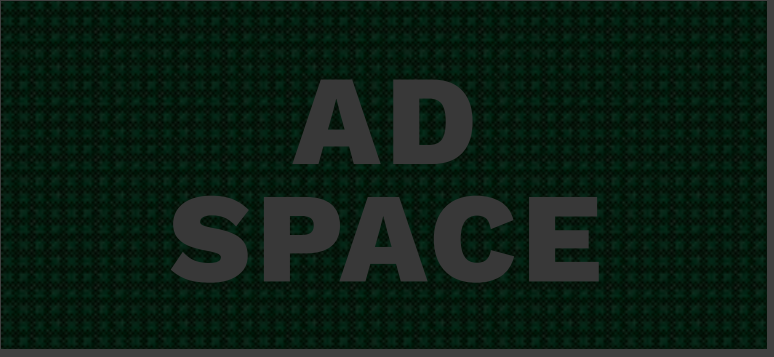
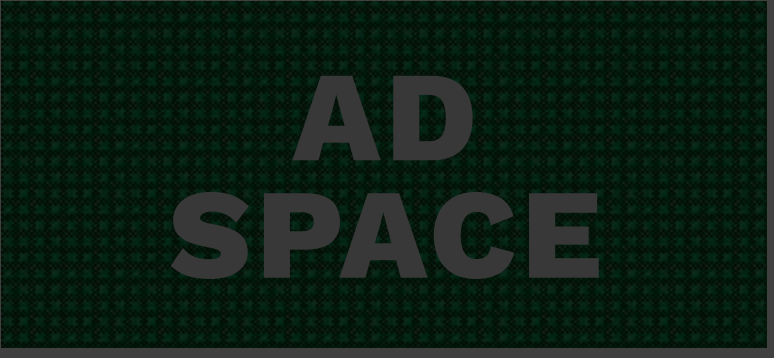
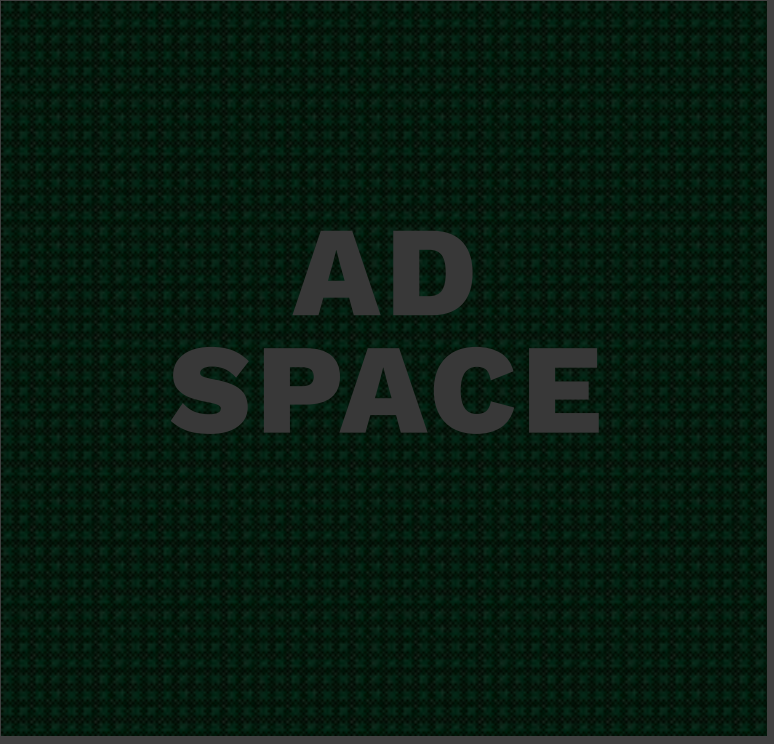
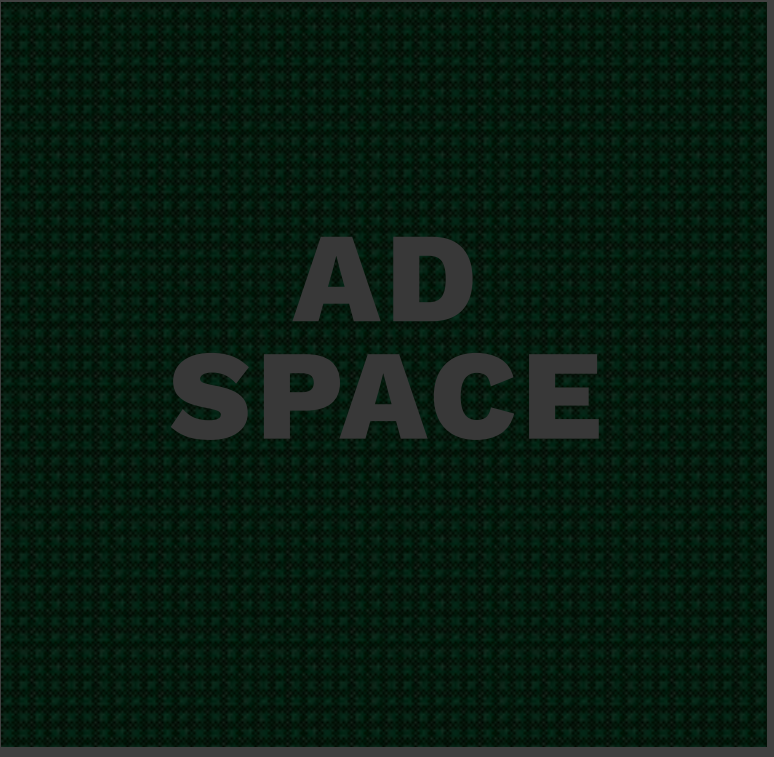
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# *Court Manager*

## **2018 Production Schedule (internal)**

### **Spring 2018 - Vol. 33/1**

Submission deadline	Monday, January 8
Final copy deadline	Monday, February 5
Ad space reservation deadline	Monday, February 12
Magazine to artist for layout	Monday, February 26
Magazine posted online	Monday, March 26

### **Summer 2018 - Vol. 33/2**

Submission deadline	Thursday, March 22
Final copy deadline	Thursday, April 12
Ad space reservation deadline	Thursday, April 19
Magazine to artist for layout	Thursday, May 10
Magazine posted online	Monday, June 11

### **Fall 2018 - State-of-Profession/Conference Issue - Vol. 33/3**

Copy deadline	Friday, August 17
Ad space reservation deadline	Friday, August 24
Magazine to artist for layout	Monday, September 17
Submit order form (#) to printer	Monday, October 1
Magazine to printer	Friday, October 5
Magazine to mail house	Friday, October 19
Magazine drops	Monday, October 22

### **Winter 2018 - Vol. 33/4**

Submission deadline	Friday, September 28
Final copy deadline	Friday, October 26
Ad space reservation deadline	Friday, November 2
Magazine to artist for layout	Wednesday, November 14
Magazine posted online	Monday, December 17



## ***Court Express 2017 Production Schedule***

### **Production Calendar for Vol. 19/1**

#### ***February 2017***

Editorial meeting	Week of Jan. 8
<b>Copy deadline</b>	<b>Feb. 12</b>
Copy to layout	Feb. 19
Proof	Feb. 23
Distribution date	Feb. 28

### **Production Calendar for Vol. 19/3**

#### ***September 2017***

Editorial meeting	Week of August 6
<b>Copy deadline</b>	<b>September 10</b>
Copy to artist	September 17
Proof	September 21
Distribution date	September 26

### **Production Calendar for Vol. 19/2**

#### ***May 2017***

Editorial meeting	Week of April 9
<b>Copy deadline</b>	<b>May 7</b>
Copy to layout	May 14
Proof	May 18
Distribution date	May 25

### **Production Calendar for Vol. 19/4**

#### ***November 2017***

Editorial meeting	Week of October 8
<b>Copy deadline</b>	<b>November 8</b>
Copy to artist	November 15
Proof	November 19
Distribution date	November 28



## National Association for Court Management

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### 2018 Guide Ideas:

- Juror Curriculum
- Revising a Current Guide:
  - Holding Courts Accountable: Counting What Counts (1999)
  - Disaster Recovery Planning for Courts (2000)
  - Community Creativity Collaboration: A Community Dialogue for the Courts (2001)
  - Court Security Guide (2005)
  - Business Continuity Management Mini Guide (2006)
  - Making the Verbatim Court Record (2007)
  - Succession Planning (2008)
  - Plain Language

Suggestion to consider aligning guide with one of SJI's priorities so the costs can be included in SJI grant. <http://www.sji.gov/priority-investment-areas/>

### 2018 Webinar Ideas:

- Domestic Violence Guide
- JTC Projects
- Trauma Awareness- Minnesota Judge
- Immigration, ICE in Courts (J.D. Gingrich)

# **Recommendation for a new NACM Website**

## **BACKGROUND**

On August 21, 2017, a Request for Estimates was distributed to five vendors for the job of creating a new website presence for [www.nacmnet.org](http://www.nacmnet.org). The vendors asked to submit estimates included: Howell Creative Group, Registered Creative, Mellen Street Creative, Web Development Technology Partners and Proximo Marketing Strategies. These companies were selected based on reputation, prior working relationships and a general recommendation.

## **DETAILS**

The following outlines the Key Problem Areas highlighted, and then the high-level requirements expected from any submittal:

### *Key Problem Areas:*

- Struggles and inabilities to perform edits quickly, easily and in-house.
- Difficulty finding information.
- Outdated design.
- Lack of mobile site.
- No indexing or meta data or tagging.
- Outdated content management system.
- 'Sister' sites built on different platforms.
- Clunky 'members only' section.
- Content is very list driven.

### *High Level Requirements:*

- Menu Navigation over the top and bottom of the page.
- Auto hide top navigation bar.
- Auto developed sitemap.
- Option to translate website content.
- Supports content/image sliders and rotators.
- Supports paid publication ads.
- Supports e-commerce.
- Supports forms (i.e. 'contact us', registration, proposal submission, surveys, etc.)
- Supports a 'members only' section, or content only available via secured access.
- Ability to support individual members profiles.
- Ability to sign-in via social media logins.
- Option to embed social media feeds.
- Option for block threads.
- Option for opting-in/out of communications.

- Mobile-friendly design option.
- Analytics or website metrics.
- Search engine optimization (SEO).
- Integration with CORE and Conference websites.
- Up to date/New Content Management System.
- Easily edible by volunteers and staff.
- Training of expert users (minimum of 5).
- Email response system (automatic).
- Photo galleries.

## **REVIEW PROCESS & RECOMMENDATION**

The initial requirements were developed by a consultation with a IT Web Team out of Multnomah County, Oregon, their IT Director, and Jeffrey Tsunekawa. This information was also weighed against the recommendations made by the report produced by Pivotal Communications. After that, a small group reviewed the five proposals that were submitted. Janet Reid (NCSC), Jeffrey Tsunekawa (Website Vice Chair) and Roger Rand (IT Director from Multnomah County, Oregon). Based on the information in the proposals and the discussion, the Communications Committee recommends that the NACM Board proceed with securing the services of Howell Creative Group for the complete redesign of the NACM website, [www.nacmnet.org](http://www.nacmnet.org).

## **JUSTIFICATION**

Howell Creative Group (HCG) provided a very in-depth and personalized proposal. Based in New Town, Virginia, HCG has been in operation for over 35 years. They are classified as a business that is “Small, Women and Minority-Owned”. They have a long list of references, case studies and clients. In the past three years, they have launched 26 websites. **The total cost for the estimate is at \$27,400.** This estimate includes the website development services, e-commerce functionality, membership portal functionality (and profiles), training and 6 months of maintenance and support. The project timeline begins on October 29<sup>th</sup>, with a tentative launch date of February 2, 2018.

The committee recommends HCG over the other four proposals because of several reasons. The cost, although high at first appearance, wasn’t the highest estimate, and is a rather reasonable rate considering the amount of content the current NACM site contains. A couple of proposals did not address many of the key requirements which demonstrated a lack of understanding of what we are clearly looking for. The time and effort put into several of the estimates were quite lacking and required much more discussion and effort that should have been presented from the beginning. Although HCG has not worked with NACM in the past, they appear to understand that we are looking for a company that will do the branding/mapping work that comes ahead of time, in addition to just the robust website.

I would also recommend that the Board consider funding for the opportunity for the Communications Committee’s Vice Chair of Website, Jeffrey Tsunekawa, to travel to Williamsburg, VA for the initial meeting with HCG, to help kickstart the project and provide some representation from the Board.



**howell**  
creative  
group



**National Association** for **Court Management**  
*Established 1985*

**Letter of submittal in response to:**

Request for Proposal  
National Association for Court Management  
Website  
September 15, 2017

*Presented by President & Creative Director, Kathy Howell*

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## 01. Executive Summary

### Howell Creative Group Gets It – We Understand What the National Association for Court Management Needs and We’re Ready to Hit the Ground Running

Thank you for your consideration of this proposal. Howell Creative Group is thrilled to support the premier National Association for Court Management (NACM), helping you share the story of your worldwide impact. Your work to improve the administration of justice by strengthening court professionals is something we’re particularly excited about. We see the NACM site as the home to inspiring, highly visual and engaging subject matter which is prime content for your association members and supporters. Let us help make your site relatable and results-driven.

Howell Creative Group’s marketing strategists, content developers and creative designers/programmers produce innovative concepts to achieve clients’ communications goals - just like yours. Since our inception, we’ve worked extensively with private and public firms, associations and municipalities to promote their mission and increase relevancy while building brand equity.

It’s not by coincidence that we have hundreds of satisfied clients across multiple industries and boast a 35-year history of internationally award-winning websites, integrated marketing campaigns, branding and communications projects. Our combination of expertise, enthusiasm and proven dedication makes Howell Creative Group an ideal partner to build and upgrade NACM’s digital identity.

### Our Vision for Your Web Design

Our unique knowledge of best web practices pulled from experience with clients that include national associations and advocacy groups, higher education, corporations and healthcare systems drives our innovative and well-positioned tactics that speak to your target audiences. We recommend a mobile-first approach to your message and brand, connecting digitally with existing NACM members and prospects. Howell will create an online experience that doesn’t just educate visitors, but compels them to act and is integrated with a user experience designed to make it easy to become a participant.

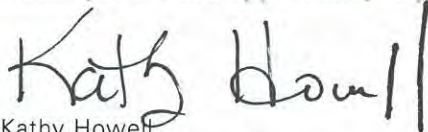
### Easy to Maintain Strategically Planned Websites

We are WordPress content management system (CMS) experts with over 30 unique live WordPress sites (as well as several large-scale sites on proprietary content management systems) each built with custom functionality and CSS programming. We have the background and creative eye to develop a site that not only is visually appealing, but has carefully thought-out code, features and functionality designed to support key messages and provide real information your target audience wants.

### We’re Your Team

Howell Creative Group would be honored to be part of the team that showcases NACM’s work online, driving your message to viewers ready to engage and collaborate. We’ll put our extensive experience in brand building and marketing entities that require selling mission and a sense of greater good to work for you. Let’s get started!

Thank you for the opportunity to partner with you,



Kathy Howell  
President & Creative Director

## 02. Company Information

### Company Background & History

As a full-service marketing, advertising and design firm headquartered in New Town in James City County, Virginia, Howell Creative Group would be honored to play a role in the website that serves as your digital membership-support gateway. Our team values creativity and innovation and are well-versed in marketing communication trends across all industries. Our staff understands the specificities of association management and appreciate that ease of use and that strategically located key messaging is crucial to National Association for Court Management's overall success.

- We're efficient, strategic brand managers
- We're committed to a value-added relationship
- Most importantly, we listen intently and use our experience to make your message and mission compelling to your target markets
- Our signature design style is clean, simple and modern

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### Services & Capabilities

Howell Creative Group has extensive experience in creating award-winning websites for municipalities, state agencies, non-profit organizations and corporate entities.

**We have launched 26 websites in the past three years.**

The firm's marketing strategists, content developers and creative designers, all located in Williamsburg, produce the fresh concepts designed to achieve clients' marketing goals.

### Breadth of Knowledge

Our agency handles a full schedule of projects including:

- Website development and programming
- Brand development and repositioning
- Strategic marketing consultation
- Interactive media planning and implementation
- Marketing collateral; all formats
- Print, niche publication, broadcast and digital advertising
- Social media strategy, execution and integration
- Media plans and placement

## 02. Company Information

### More on Why Howell Creative Group is the Right Choice - Corporate Responsibility

#### HISTORY OF CORPORATE GIVING, VOLUNTEERISM AND GRATIS SERVICES

By becoming a client of Howell Creative Group, you are supporting a small business that goes above and beyond to help nonprofits, the community and neighbors in need. We value partnering with like-minded organizations who believe the business community should share success whenever possible and improve the lives of those around us.

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#### WE GIVE BACK - A LOT

It's not unusual for our firm to donate more than \$60,000 a year in pro-bono marketing services. We've developed websites, managed social media engagement and built brands for local organizations in need. Numerous human services, animal-related and environmental cause-related nonprofit groups have achieved their goals with the help of our team.

We close our office to participate in the United Way Day of Caring held each September. (We joke, the temperature that day often feels like the hottest day ever.) For many years during the Day of Caring we've helped run the Back-to-School Carnival in Grove, a low-income area nearby. We serve dinner to families, play games with school children and help provide them with free supplies for their school year.

In addition to company-wide engagements, our staff can volunteer during the workday, with pay. As long as client deadlines are met and fires are out, staff members assist hands-on in any way they find meaningful.

#### GIVING BACK GIVES US GOOD HUMANS

We believe this philosophy attracts and retains the best talent - which benefits us and our clients! Morale stays high and employees are happy knowing we fight for good causes as part of our daily work experience. By partnering as a client, you're a proud part of the good we do.

## 02. Company Information

### Benefit from a Team Approach

All work produced by Howell Creative Group will be completed in-house. With strategic knowledge and attentive quality assurance procedures, nothing leaves our firm without several eyes reviewing each component. Founder, President and Creative Director Kathy Howell personally signs off on all work so you can be confident that your website has been critiqued and tested by expert individuals before coming to you for consideration.

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### Points of Contact

Kathy Howell, President & Creative Director  
kathy@howellcreativegroup.com

Tiffany Reaves, Senior Account Director  
tiffany@howellcreativegroup.com

John Thomas, Interactive Art Director  
john@howellcreativegroup.com

4350 New Town Ave., Suite 201  
Williamsburg, Virginia 23188  
757.253.1542

Bios follow





## 02. Points of Contact Credentials



### KATHY HOWELL

**President & Creative Director**  
**39 Years of Experience**

#### OVERSEES ALL WORK

Kathy Howell began her career as an agency art director, continuing on to work in both the public relations and marketing communications fields, including serving as Director of Public Relations for Associated Inns and Restaurants of America, Inc. She opened Howell Creative Group in 1982 and her commitment to the creation and execution of successful marketing, branding and design projects for the firm's clients is the foundation that has led to a successful three-decades-old company. She encourages her team to apply creative strategies to achieve those goals saying, "We always strive to ensure that our clients get more than their money's worth. Your success is our main focus."

- Women in Business Achievement Award, *Inside Business Journal*
- Small Business Person of the Year, Greater Williamsburg Chamber & Tourism Alliance
- Outstanding Contribution to the Cultural Life of Greater Hampton Roads, Cultural Alliance of Greater Hampton Roads
- Graduate, Hampton Roads CIVIC Leadership Institute
- Graduate, LEAD Historic Triangle
- William & Mary CEO Forum Member
- Former President, Virginia Living Museum Board of Trustees
- Past board member, Historic Virginia Land Conservancy
- Past board member, United Way
- Member, American Graphic Design Association
- Member, American Advertising Federation
- Summa Cum Laude Graduate of Georgia Southern University

"I love it when great creative ideas and smart marketing strategy come together in that 'Ah ha' moment."





**TIFFANY REAVES**  
**Senior Account Director**  
**10 Years of Experience**

**YOUR POINT OF CONTACT**

Creative, confident and quantitatively focused, Tiffany is a consumer behavior-driven account director with a track record for identifying opportunities for growth and building relationships. She's a self-starter with cross-functional experience in brand building and repositioning, brand engagement and creative services management. Tiffany is an innovative campaign planner and effective copywriter with an imaginative approach. Her work in marketing management enables her to develop integrated marketing concepts and find the mediums you need for ultimate effectiveness. Her drive for results, innovation and collaboration are natural instincts, which help ensure client success. Did we mention she's a VA Tech alumni and avid Hokie fan?

- *Inside Business Journal*, Top 40 Under 40 Business People
- Graduate, LEAD Historic Triangle
- Board Vice-Chair & Volunteer of Year, YMCA
- Board member, American Marketing Association of Hampton Roads (HRAMA)
- Selected by AMAHR to represent Eastern VA at AMA's Leadership Summit; only 350 people were hand chosen
- Client partnerships/expertise include:
  - City of Newport News EDA



**JOHN THOMAS**  
**Interactive Art Director**  
**15 Years of Experience**

**YOUR TECH GURU**

A naturally gifted, tech savvy designer, John oversees digital marketing development and website production. Working concept-to-code, John is experienced in an array of Web-based applications and programming languages with a specialty in WordPress CMS customization and branding.

With a degree from Old Dominion University, John is keenly focused on creative thought and visual solutions inspired by the key theories and principles of effective communication design. He understands that creating impact with visual rhythm, design-by-grid and proper hierarchy of information is the key to building long-term brand equity for clients. John has a passion for ideas that live at the intersection of advertising and technology and that clearly communicate your message.

Client partnerships/expertise include:

- Newport News Economic Development
- Patient Advocate Foundation
- Sea World/Busch Gardens
- Virginia Living Museum
- William & Mary
- Virginia Sea Grant
- Tech Center Research Park
- Riverside Health System

## 03. Howell's Proposed Solution

### Creating Value Through Smarter, Fresher Web Design

As a team that values creativity and innovation, Howell Creative Group will be fully vested in your project, ensuring your ideal custom WordPress solution is achieved (recommended open source, easy-to-maintain CMS). The superior quality of work on which we have built our reputation is guaranteed for your website development project. In the last five years, Howell Creative Group has won multiple American Web Design and Summit International Creative Website Awards. You can expect this level of quality for your website.

You're invited to review these recent web launches. We believe you'll appreciate the branding and design sensibilities exemplified in this work.

- [newportnewsva.com](http://newportnewsva.com)
- [riversideonline.com](http://riversideonline.com)
- [vaseagrant.org](http://vaseagrant.org)
- [innovateattechcenterva.com](http://innovateattechcenterva.com)
- [caskandshaker.com](http://caskandshaker.com)

We are prepared to develop an easily navigable and functional website that will fluently speak to your professional constituents. We anticipate how members will interact with your website and strategize design around their experience. Plus, we fully understand how critically important it is for a site to be easily managed and maintained by non-technical administrators, and use CMS tools that aid in long-term sustainability.

The National Association for Court Management web project has three phases and five primary steps:

#### **PHASE 1 - UXD**

1. Discovery, Review & Study
  - Onboarding, Initiation & Goal Setting
  - UXD/Homepage Design
  - Sitemap Development

#### **PHASE 2 - Design/Build**

2. Content Migration & Development
  - Copy & imagery analysis
3. User Interface Design & Art Production
  - Interior pages development
4. Programming & Implementation/Launch
  - Desktop, Tablet and Mobile Coding
  - Controlled Launch & Public Launch
  - E-commerce (Add-on service, optional)
  - Membership Portal (Add-on service, optional)

#### **PHASE 3 - Post-Launch**

5. Training & Support
  - Post-Launch Quality Assurance and Maintenance

## 04. Summary of Proposed Plan

### Website Development & Programming

The website we create will cohesively blend powerful visuals with your strategic messaging. The site will be designed to quickly and carefully navigate users in a logical way, so that your messaging and mission are seamlessly integrated into a branded, fresh, visually appealing website.

Howell Creative Group specializes in developing highly functional, interactive websites on the easy-to-update WordPress content management system. We plan to build a sustainable site using well-tested modules designed to engage the users, guiding them to their desired destination.

During the website development process, we will take into account the need for:

- Editable slider images on the home page and interior pages, perhaps with video background, which we often do
- Social media integration throughout the site, feed plug-ins installed on homepage
- Search engine optimization best practices integrated throughout (meta data, etc.)
- Google analytics tracking
- Online photo gallery to drive humanization and reflection of self to promote membership
- Membership purchase functionality
- Responsive design for mobile devices
- Membership portal
- Visible sitemaps
- Translation plug-ins for all content and menus
- Blog integration and setup
- Sticky navigation
- Form submissions with routing to one or more personnel
- Integration of Constant Contact, MailChimp or Emma eblast system
- Publication/Whitepaper/Resource archive (Howell recommendation)
- Easy-to-use WordPress content management system structure and back-end programming with our best practices for usability, capability and accessibility
- Secure and supported hosting set-up

### Quality Assurance & Maintenance

We offer an in-depth training session with your team to provide instruction on updating the website and navigating the content management system. Instructions will be provided so the team can easily reference what was taught (but of course, we are always a phone call or e-mail away).

We recommend hosting the site with WPEngine. They provide exceptional customer service and up-time record and offer a daily backup of your website to protect materials. Not all hosts do this critically important function. Logs are created to easily revert to any previous version of content. With our ongoing relationship and experience working with WPEngine, we will serve as the communicator between you and the host in order to quickly solve any questions that arise, if a post-launch support agreement is approved. Hosting support is provided 24/7 via a help desk. Howell Creative Group emphasizes a client-first attitude and provides staff contact information for emergencies.

Howell Creative Group is on hand to update and monitor the website once launched. Within a maintenance plan, we can install all upgrades to the CMS as they appear. In addition, we will review the website's analytics monthly and troubleshoot any issues that may come up.



## 05. Proposed Budget & Scope of Services

### Cost of Services

Howell Creative Group provides estimates as single, not-to-exceed budgets per project. We offer additional, hourly rates if you wish to continue any marketing or design services beyond the website development or has scope additions to the website. We bill according to milestones, anticipate 50% of total fee due at contract approval, 25% due at delivery of beta link and project paid in full at final launch.

The website development fee reflects all assets (copy, images and video if applicable) supplied to Howell for implementation without supplementary research or acquisition on your behalf.

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### Website Development & Programming

Howell Creative Group proposes to begin the process of website design with a pre-build meeting to engage your team and uncover unmet needs of current design as well as present a competitive landscape review of other national association material and recommendations for you to consider. After the initial pre-build meeting, Howell will begin developing the User Experience Design (UXD)/Homepage, then website hierarchy for decision-maker review. After Phase 1 approval, we begin programming on a test link, where you can monitor progress, real-time, until launch.

We provide a tried and tested method to developing websites that creates efficiencies across five project steps.

#### PHASE 1 - UXD

##### 1. Discovery, Review & Study

- Consultation, kickoff, review functionality of current and example sites
- Sitemap framework and UXD/Homepage, presented to the client for review and approval prior to beginning the programming
- Technical strategy, content audit, Google Analytics evaluation and membership management technology determined

#### PHASE 2 - DESIGN/BUILD

##### 2. Content Migration & Development

- Copyediting/styling using authentic voice for brand on all top level pages
- Compelling headlines and calls-to-action on top level pages, if needed
- Image/Photography resize and media gallery creation in CMS

- Content migration from current Wordpress theme and styling up to 35 pages

#### DESIGN/BUILD, Cont.

##### 3. User Interface Design & Art Production

- Manipulation and custom styling on the content management system
- Multi-layered design for fully responsive mobile, tablet and desktop versions
- Integration of social media and 2 to 3 other out-of-the box plugins for custom functionality (calendars, publication archive, lead generation capture)
- Google Analytics integration
- Membership portal, if add-on selected
- Payment processing/basic cart design, programming up to 12 items, if add-on selected

##### 4. Programming & Implementation/Launch

- Programming / clean coding using latest languages: HTML 5, Javascript (for interactivity), CSS 3, PHP, etc.
- Homepage photo presentation or graphics animation or video integration (trend is video backgrounds)
- Site testing, server configuration and compatibility analysis across latest versions of Google Chrome, Safari, Firefox, Microsoft Edge and IE 9, IE10, IE11 on our browser testing cloud

#### PHASE 3 - Post-Launch

##### 5. Training & Support

- Session to provide instruction on updating site and navigating the customized CMS
- Instructions guidelines/references
- One (1) hour of technical troubleshooting, edits or consultation provided  
**at no charge**

## 05. Proposed Budget & Scope of Services

### Fees for Website Development Services

#### Base Website

Approximately 140 hours, 15 weeks  
concept-to-launch

**\$15,500**

#### ADD-ONS

#### E-commerce Functionality

Approximately 34 hours

**\$3800**

#### Membership Portal Functionality/Profiles

Approximately 37-49 hours

**\$4100 – \$5400**

### Fees for Post-Launch Quality Assurance & Maintenance

#### Training

- Session with the NACM team to provide instruction on updating website and navigating the content management system
- Instructions provided, digital format

**Value Add - No Charge**

#### 6-mos. Technical Maintenance & Support Optional, but recommended

Approx. 4 hours/mo

(Our firm will offer you one hour after launch **at no charge**, after which this optional maintenance agreement can begin)

**\$2700**

*Our estimates do not include expenses such as custom or stock photography, premium plugins or software, licensing fees or hosting.*

*Estimates based on all content in RFP and assuming two rounds of client edits. Estimates only, final budget and scope to be defined after full project disclosure and group discussion.*



## 06. Project Timeline

### List of Tasks & Project Turnaround

Based on a hypothetical project start date of October 20, we have outlined milestone tasks and timelines for completion. Dates in green suggest in-person conversations, minus final launch date.

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#### Website Development

<b>Oct 20</b>	Pre-build onboarding meeting with National Association for Court Management
Oct 31	Howell provides NACM with proposed main navigation (if changing)
Nov 6	Howell determines structural theme, plug-ins based on NACM functionality list and begins UXD design & messaging of homepage
<b>Nov 21</b>	NACM meeting with Howell to review full site map and UXD/homepage
Dec 5	NACM provides final content based on approved sitemap
Dec 27	Howell presents the initial beta site to NACM to review interior layout & functionality 1 click deep
Dec 27-Jan 11	Howell continues development of beta site
Jan 18	NACM provides edits to Howell for Beta site
Jan 23	Howell completes edits, revised Beta site sent to NACM
Jan 26	NACM provides Howell with any final edits
<b>Jan 30</b>	Howell completes final edits; WordPress training session with NACM
Jan 31	NACM & Howell conduct final testing on site (links, browsers, etc.)
Feb 1	NACM approves site to launch
<b>Feb 2</b>	Tentative launch of the National Association for Court Management website

Any additional functionality added during the development process could add time and incur additional fees.

## 07. Agency References

### Client References

Howell Creative Group's experience supporting a diverse client base with web and marketing communications services allows us to offer Greater Williamsburg a wealth of creative expertise.

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#### City of Newport News Department of Development

Robin Boyd  
Marketing Coordinator  
2400 Washington Avenue, 3rd Floor  
Newport News, VA 23607  
Email: rboyd@nnva.com  
Phone: 757.597.2840  
Fax: 757.597.2845

Howell Creative Group serves as the Agency of Record for Newport News Economic Development Authority/IDA; this marks the third, renewed contract year. During that time Howell Creative Group has provided consultation services, created an integrated marketing campaign highlighting what makes the City great, developed and launched a new website (newportnewsva.com) using a clear, organized site map and produced print and digital Annual Reports plus other collateral.

#### Virginia Sea Grant

Ian Vorster  
Communications Center Manager  
Virginia Institute of Marine Science  
PO Box 1346  
Gloucester Point, VA 23062  
Email: igvorster@vims.edu  
Phone: 804.684.7362

Howell Creative Group standardized the Sea Grant brand and developed guidelines for the communications team to build branded material. Their Annual Report, brand upgrade and image package were also completed. An extensive website was developed to house research material and support data visualization designed to engage the public.

Recently a transmedia (multi-platform) website was developed and launched for national research on how increased web interactivity affects a subject's ability to understand science communication. *Inside.vaseagrant.org* is a highly engaging site developed as an alternative to the scholarly report or whitepaper.

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#### Fort Monroe Authority

Phyllis Terrell  
Director Of Marketing  
20 Ingalls Road  
Fort Monroe, VA 23651  
Email: pterrell@fmauthority.com  
Phone: 757.251.2751  
Fax: 757.637.7776

Howell Creative Group has served as the Agency of Record for the Fort Monroe Authority for over six years. Howell produced a tourism-focused microsite highlighting what is happening at Fort Monroe while it transitioned from an Army base to a mixed-use community. Howell then developed full branding and an in-depth website with content for internal and external audiences including dynamic features such as an event calendar integrated with iCal and Google Calendar, an interactive "share your story" section and a brand standards portal. Providing consultation services, marketing campaign development, creating the Fort Monroe Authority Annual Report and Annual Report Microsite are among other services performed.

#### Patient Advocate Foundation

Kelly Alvord  
Public Relations Coordinator  
421 Butler Farm Road  
Hampton, VA 23666  
kelly.alvord@patientadvocate.org  
Phone: 757.528.4701  
Toll free: 800.532.5274

Howell Creative Group has worked with the Patient Advocate Foundation for more than five years. Services include internal marketing work including PAF social media branding, infographics and datagraphics to web work and marketing collateral. We collaborated with PAF and the Center for Disease Control (CDC) to name, brand and market the SelfMade Health program across the nation.



## 07. Reference Letter of Recommendation

### City of Newport News Economic Development

Howell Creative Group has worked with Newport News more than five years. During this time, we completely remade their website twice, initially moving their proprietary CMS system to Wordpress, then remaking a second Wordpress website with functionality and technology.



January 7, 2016

To Whom It May Concern:

The City of Newport News Economic Development Authority (EDA) is pleased to recommend Howell Creative Group for any marketing, branding, digital, advertising and creative services. The EDA has retained Howell Creative Group as Agency of Record since 2012, and we have always enjoyed a positive and productive business relationship.

Howell Creative won our business through a competitive RFP process. They came aboard and offered new and progressive ideas with qualified strategists and design staff, and lead our account with a proactive eye and streamlined account management. The Howell team is able to navigate not only the nuances and specialties within our industry, but manage work through our committee structure and keep projects on time and within budget. Howell Creative was instrumental in rebranding and implementing this new brand with the EDA and staff. Through collaboration with stakeholders, they helped refine our messaging and methodologies, and executed many digital, print and other marketing initiatives.

Howell Creative Group delivers outstanding results, and we are happy to have them as a resource to our municipality.

Sincerely,

Florence G. Kingston  
Secretary/Treasurer

FGK:sjw

\\\\itnas3\\pda\_share\\FGK\\01.06.2015 Howell Creative Letter of Recommendation.docx

## 07. Reference Letter of Recommendation

### Preservation Virginia, Jamestown Rediscovery/Historic Jamestowne

Howell Creative Group worked to migrate two large websites into one singular web source. We used Wordpress to accomplish very intricate archive, database and ecommerce functionality. We then trained their team on how to do technical and content updates.

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## 07. Reference Letter of Recommendation

### Patient Advocate Foundation (PAF)

Howell Creative Group has now built two websites for PAF in addition to many other marketing projects. Additionally, we worked with their sister organization out of Washington, DC, National Patient Advocate Foundation, on healthcare reform and policy communication materials.



January 8, 2016

To Whom It May Concern:

I am writing this letter as a recommendation for Howell Creative Group, headquartered in Williamsburg, VA.

We are honored and delighted to share our positive experience working with **Howell Creative Group**. Kathy Howell and her team have supported our nonprofit organization in numerous design and marketing initiatives each year since 2012. Our projects are consistently completed on-time, on budget, and incorporate a level of creativity and professionalism that is unmatched by other vendors.

When working alongside the Howell team, you can see that they strive to comprehend the project vision and the goals in the beginning, and thus develop an outstanding in-depth working knowledge that produces results that far outshine normal expectations. Each team member works to understand the core elements of your organization, the goals of the project at hand, a sense of how the materials will be utilized today and in the future, all to deliver objectives in a thoughtful manner which produces the results you are seeking. In this sense, they don't just deliver on a basic set of industry 'standards' that many organizations do, but instead customize messaging to match each client and their needs, all while being compliant with project timelines and budget. Doing so allows Patient Advocate Foundation to be a leader among our nonprofit peers today and provides a perfect base to grow our future communication and marketing needs.

Currently, they are our go-to agency for any project that comes through our marketing and communication department, and have become a favorite among other departments within our organization including the development, fundraising and event management teams.

Some of the projects that my Mission Delivery team has worked with Howell Creative Group in 2015 include:

- Original name & tagline development for a new division of services
- Full logo and brand identity creation for a grant-funded division of our organization (\*the logo actually won a 2015 American Graphic Design Award in October)
- Full website creation, including the technical build and custom design and layout
- Numerous print or electronic collateral materials connected to various branded projects, including letterhead, biz cards, newsletters, report and case study templates, PowerPoint templates, flyers, trade show booth displays, etc.
- Video production and accompanying print materials, including script writing for video

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477 Butler Farm Road | Hampton, VA 23666 | Phone (800) 532-5274 | Fax (757) 873-8999 | [www.patientadvocate.org](http://www.patientadvocate.org)  
Fax (804) 541-8063 (12)

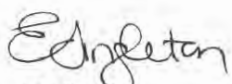
## 07. Reference Letter of Recommendation

### Patient Advocate Foundation, continued

- Copywriting and writing support for newsletter articles and educational materials
- Social media support, including post graphics, cover photos, messaging, hashtags and strategy
- Brainstorming about many different projects to come

In general, we love the Howell Creative Team and would recommend them to any local or national group seeking a design partner they can rely on. I'm happy to share any samples of work they have completed for us, or talk further if needed. But in general, I would recommend Kathy Howell and her team to the highest degree for any project you are considering.

Sincerely,



Erin Singleton  
Chief of Mission Delivery  
Patient Advocate Foundation



## 08. Case Study : Newport News Economic Development Website

### Challenge – How Do We Create a Sense of Place and Highlight Differentiation?

The municipality's initial website was not only developed on outdated technology but had complicated navigation and featured messaging and visual style that was not differentiating the locale. Flash programming operated the menu bars, making it impossible to visit internal pages when viewing mobility. The messaging needed to be reworked to elevate the perception of Newport News as a "new Blue Collar" business hub featuring urban amenities complemented by smaller-town connectivity.

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### Solution –

#### Feature-Rich and Distinctly Branded

Content was organized into clear categories and navigation simplified to facilitate fast access to key features. Action-oriented headlines and content were written to acknowledge the community's "citified" geography and promote their commercial districts to site selectors while engaging with and showing appreciation for current businesses.

#### Pertinent Features

- WordPress CMS
- Interactive Cost-of-Living Wizard Tool
- Property Finder Database Integration
- Print Function for Interior Pages
- Photography/Icon-based Hot Links
- Information Architecture
- Breadcrumb Navigation

### Results –

#### 600% Increase in Traffic Plus Less Bounce, More Page Views (on site #1)

Not only did the site pass an intensive inspection and earn a resounding "blessing" by the municipality's Executive Marketing Committee that consisted of senior leaders from the top regional employers, the analytics conveyed a 600% increase in traffic. Aside from the initial buzz, the trifecta of web analytics (many hold these in higher regard than traffic measure) were clear, measurable successes.

- +15% users viewing more pages, reading deeper into website
- +44% users staying on site longer
- 12% decrease in bounce rate, people are opening site and know it's a credible URL

*These figures produced for a 12-month analysis*

## 08. Case Study

### Next Steps –

#### Continued Improvements for their Second Website and Dynamic Updating

##### *Responsive Rendition*

During our latest launch for Newport News, we identified improvements and among others implemented fully responsive programming. The CMS structural theme was mobile-friendly but did not initially offer a responsive version. Their newest site has unique viewing for desktop, tablet and mobile optimization, which is increasingly important for search engine ranking as Google will now penalize domains that do not include mobile versions.

##### *Attract More Visitors*

We integrated nine multi-lingual translations in response to increased international traffic and strategic ED missions focused on several key target countries.

##### *Create Specialized, Focused Microsite Environments*

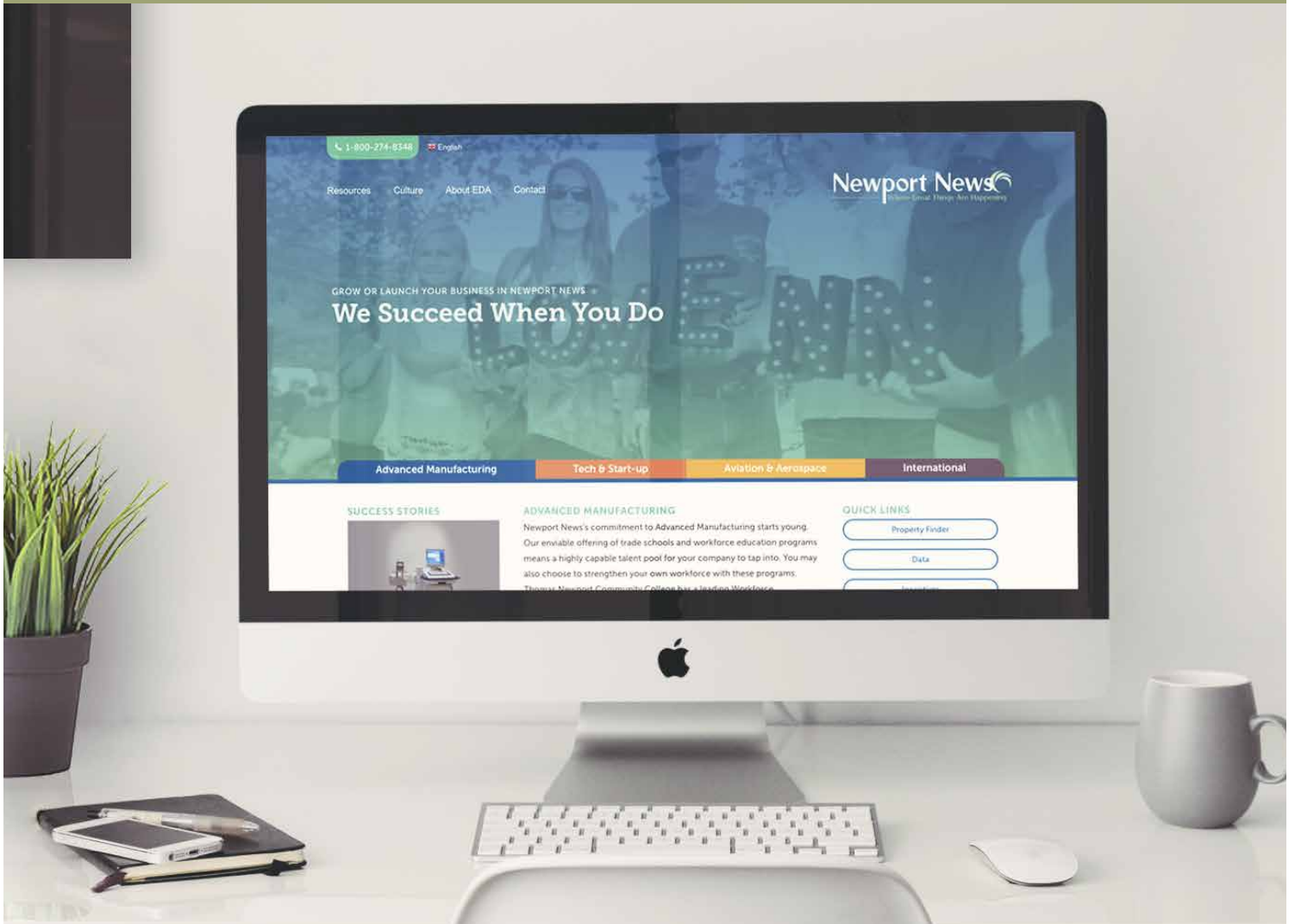
We built out Annual Report microsites. This has allowed more conversions and qualified requests for information while providing some of the most compelling business development highlights in a savvy and robust format. This integrates nicely with a digital marketing strategy Howell has also employed for the City.

#### Results from Launch #2

- +40% increase in time spent on site
- +10% increase in pages per session
- +8% increase in page views
- +100% increase in direct traffic

*“The Howell team captured the essence of our City and brought that to life online. The website development process was highly efficient with solid communication throughout. We appreciate their technical expertise, creativity and attention to detail which resulted in a final product that exceeded our expectations.”*

– Robin Boyd  
Marketing Coordinator/Direct Point of Contact  
City of Newport News, VA



## 09. Current and Past Client List

Full Service/Agency of Record					
					
Website/Digital					
					
					
					
			Corporate Communications/Marketing		
					
					
					
Brand Development					
					
					



## 10. Samples - Our Work

Our team strives to answer questions before they're asked. We streamline scheduled review sessions by doing our homework to make your job as easy as possible.

We're positive any of these clients would provide you that same feedback!

### Fort Monroe

*In-redevelopment Mixed-use Community,  
National Monument & Park*

#### Website Development



### Ferguson Center for the Arts

*Performance Art Venue*

#### E-Commerce Website & Season Marketing Collateral



### Riverside Health System

*Regional Comprehensive Health Care Provider*

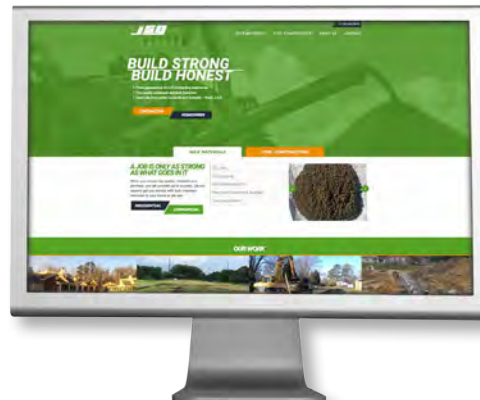
#### Enterprise Website

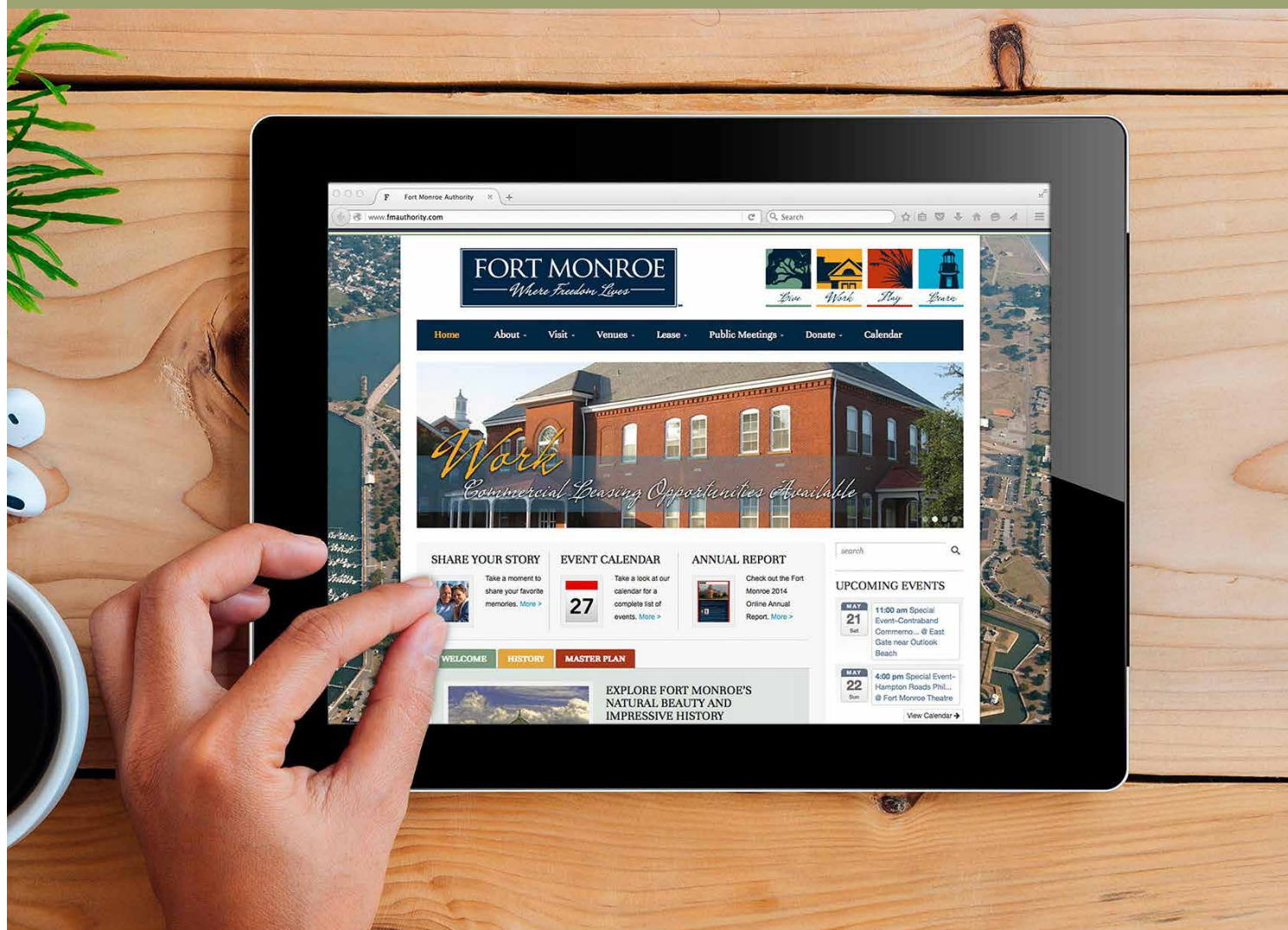


### J.S.G. Corporation

*Sitework Engineers*

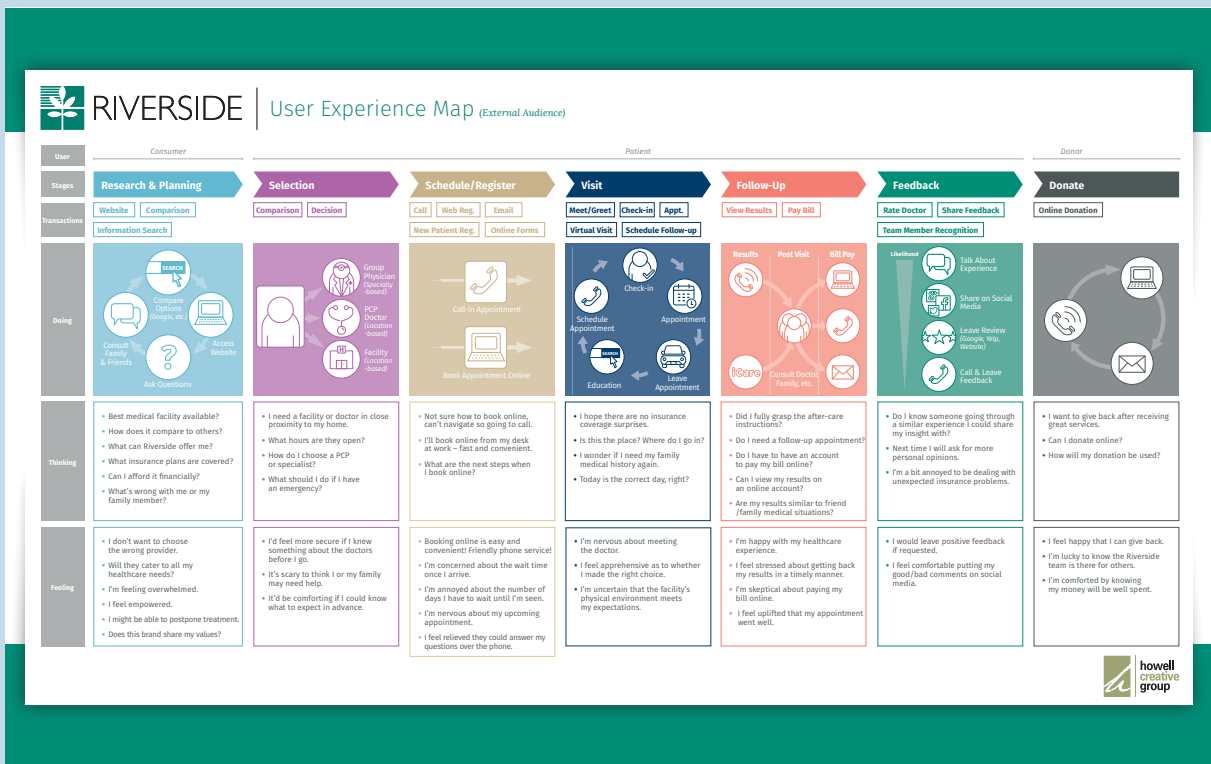
#### Website Development

















**Committee Progress Report Form – 2017-2018**

**Committee:** \_\_\_\_\_ **Governance** \_\_\_\_\_

	Report	Due Date	Submission Date
X	Fall Progress Report	September 5, 2017	August 31, 2017
	Midyear Progress Report	January 16, 2018	
	Annual Progress Report	June 20, 2018	

Project	Project Status	Strategic Priority? (Yes/No)	Discussion Needed? (Yes/No)	Board Action Needed? (Yes/No)	If Yes to discussion or action, please describe what needed
Strategic Objectives for the Committee	A discussion occurred by the Committee on possible strategic objectives for this year. The list the committee discussed included: <ul style="list-style-type: none"><li>a. Develop, present and institutionalize a State of Court Management address</li><li>b. In partnership with the Communications Committee further develop a communication strategy (including media engagement), to bolster the National Agenda specifically and NACM generally</li><li>c. Further develop the concept of the "Voice of the Profession" and how NACM can serve in that role, for presentation to the Board</li></ul>	Yes	Yes	Yes	Need Board additions, deletions, alterations to the proposed list of objectives

Project	Project Status	Strategic Priority? (Yes/No)	Discussion Needed? (Yes/No)	Board Action Needed? (Yes/No)	If Yes to discussion or action, please describe what needed
	<ul style="list-style-type: none"> <li>d. Continue the efforts of the Ethics Committee to focus on education, publications and membership needs</li> <li>e. Develop and institutionalize an annual process to review and update the Operations Manual</li> <li>f. Review resolutions and propose original resolutions for consideration of the Board</li> <li>g. Track the implementation of the Strategic Plan</li> </ul>				
Ethics Committee	The sub-committee has meet once with a second call scheduled for September. The sub-committee is starting to explore writing a new Canon on speciality courts and the ethical issues involved.	No	No	No	
Review and draft Resolutions as requested	The latest resolutions adopted by COSCA will be discussed on a sub-committee teleconference in September.	No	No	No	
"Voice" of the Profession	The discussion on the "Voice of the Profession" started last year will continue during the September teleconference.	Yes	No	No	

Time needed at meeting for Committee report: 5-15 mins. depending on the discussion of the proposed objectives.

Submitted by: Greg Lambard

Date: August 31, 2017

**CONFERENCE OF CHIEF JUSTICES  
CONFERENCE OF STATE COURT ADMINISTRATORS**

**Resolution 4**

**Supporting Federal Efforts to Promote Pretrial Risk Assessment**

WHEREAS, in 2013, the Conference of Chief Justices and Conference of State Court Administrators endorsed a Policy Paper on Evidence-Based Pretrial Release that urged court leaders to promote and adopt evidence-based assessment of risk in setting pretrial release conditions to the greatest degree consistent with assessment of flight risk and threat to public safety and to victims of crimes; and

WHEREAS, according to the United States Bureau of Justice Statistics, an estimated 12 million arrests are made each year, with a large majority of those arrests being for non-violent crimes; and

WHEREAS, pretrial detainees account for more than 60 percent of the inmate population in United States jails; and

WHEREAS, many of those who are incarcerated pretrial do not present a substantial risk of failure to appear or a threat to public safety, but lack the financial means to be released; and

WHEREAS, many of those detained can suffer job loss, home loss, and ruined social relationships, and according to the United States Department of Justice, “receive more severe sentences, are offered less attractive plea bargains and are more likely to become ‘reentry’ clients because of their pretrial detention regardless of charge or criminal history”; and

WHEREAS, detaining many individuals pretrial greatly stresses publicly funded jails and is a large taxpayer burden; and

WHEREAS, according to the Pretrial Justice Institute, only 10 percent of jurisdictions use a validated, empirically developed risk assessment tool; and

WHEREAS, several states have moved to reform the bail system through legislation and by implementing evidence-based pretrial services to lower the number of non-violent offenders being held pretrial; and

WHEREAS, federal legislation, such as the Pretrial Integrity and Safety Act of 2017, has been introduced to provide grant funds to assist states to reform their criminal justice systems by implementing evidence-based alternatives to money bail, including pretrial justice assessments that measure risk of flight and future criminal conduct; and

WHEREAS, under this proposed legislation, state courts, local governments, tribes, non-profits and faith-based organizations would be eligible to apply for the grant funds;

NOW, THEREFORE, BE IT RESOLVED that the Conference of Chief Justices and Conference of State Court Administrators support the passage of legislation, such as the Pretrial Integrity and Safety Act of 2017, that will result in a more just, equitable and fair treatment of all accused individuals, while protecting public safety and saving taxpayer dollars.

Adopted as proposed by the CCJ/COSCA Criminal Justice Committee at the CCJ/COSCA Annual Meeting on August 9, 2017.

**CONFERENCE OF CHIEF JUSTICES  
CONFERENCE OF STATE COURT ADMINISTRATORS**

**Resolution 8**

**Creating a Conference of Chief Justices/Conference of State Court  
Administrators Opiate/Opioid Abuse Task Force and Calling on the Federal and  
State Governments to Increase the Resources Available to Combat the  
Opiate/Opioid Crisis**

WHEREAS, the opiate/opioid abuse epidemic is one of the most serious substance abuse problems the United States has faced and one that knows no geographical, political, or governmental boundaries; and

WHEREAS, opiate/opioid abuse is quickly becoming a leading cause of death in many states, particularly with the introduction of opioid analogues such as fentanyl and carfentanil; and

WHEREAS, the opiate/opioid abuse epidemic is placing a significant burden on many states' criminal justice, corrections, public health, foster care, treatment, and social services systems; and

WHEREAS, the consequences of opiate/opioid abuse are not limited to the abuser but often extend to children, families, and communities, and opiate/opioid abuse is rapidly becoming a leading cause for removing children from the care of their parents; and

WHEREAS, state court systems are facing significant challenges in addressing the opiate/opioid abuse epidemic and its consequences; and

WHEREAS, state courts are in a unique position to promote cooperative leadership in addressing this crisis;

NOW, THEREFORE, BE IT RESOLVED by the Conference of Chief Justices and Conference of State Court Administrators that the Conferences hereby create a Conference of Chief Justices and Conference of State Court Administrators Opiate/Opioid Abuse Task Force; and

BE IT FURTHER RESOLVED that the Conferences call for an increase in state and federal resources directed at this epidemic to stem increases in opiate/opioid abuse, addiction, and death, and to implement programs and policies specifically designed to reduce the potential for opiate/opioid abuse in the future.

Adopted as proposed by the CCJ/COSCA Regional Judicial Opioid Initiative at the CCJ/COSCA Annual Meeting on August 9, 2017.



**Committee Progress Report Form – 2017-2018  
Committee: Membership**

	Report	Due Date	Submission Date
<b>X</b>	<b>Fall Progress Report</b>	<b>September 5, 2017</b>	
	Midyear Progress Report	January 16, 2018	
	Annual Progress Report	June 20, 2018	

Project	Project Status	Strategic Priority? (Yes/No)	Discussion Needed? (Yes/No)	Board Action Needed? (Yes/No)	If Yes to discussion or action, please describe what needed
Targeted Membership	Board approved the Linked In Campaign and it is kicking off here in September. We delayed it one month while we worked on the On-boarding campaign. SFA #1 Section 1	Yes	No	No	
Onboarding	We have received a campaign from Registered creative. The Subcommittee has drafted up 7 communications #1 Welcome, #2 Website Features, #3 Committee's, #4 Be Social, #5 Conferences, Webinars, and mentoring, #6 Profile, & #7 Renewal. SFA#1 Section 2	Yes	No	No	
Membership Rates	Committee proposal to rename the E-member to First time member with a rate of \$75. See attached proposal/communication.	No	Yes	Yes	Vote to approve/deny rate increase request effective 1/1/2018
COSCA	Committee proposal to offer Non-NACM COSCA members a 2018 membership.	YES	Yes	Yes	Vote or direction to proceed with attached proposal

Project	Project Status	Strategic Priority? (Yes/No)	Discussion Needed? (Yes/No)	Board Action Needed? (Yes/No)	If Yes to discussion or action, please describe what needed
Dual Membership	Dual membership agreements – review, renew, and new agreements.	Yes	Yes	Yes	New agreement from NCJFCJ National Council of Juvenile and Family Court Judges
Mentoring	No Update at this point				
ECP	Update on Midyear Conference				

**Time needed at meeting for Committee report: 30-45 Minutes**

**Submitted by: Jeff Chapple**

**Date: September 5, 2017**



### **Membership Rates**

<b>Annual Membership Rates</b>	
<input type="checkbox"/> <b>REGULAR</b> Employed in court position, education, research, or consulting	<b>\$125</b>
<input type="checkbox"/> <b>ASSOCIATE</b> Interest in administration of justice	<b>\$125</b>
<input type="checkbox"/> <b>STUDENT</b> (Please submit student addendum and proof of enrollment with application) Full-time or part-time student in related field	<b>\$35</b>
<input type="checkbox"/> <b>E-Member</b> First-time members. Publications received electronically; renewable twice only.	<b>\$35</b>
<input type="checkbox"/> <b>RETIRED</b> Retired from the judicial system	<b>\$50</b>
<input type="checkbox"/> <b>SUSTAINING</b> Person, firm, or corporation supportive of NACM goals	<b>\$350</b>

Committee Proposal is to rename the E-member to First Time member and offer a \$75 rate. This would obviously only be a onetime first time option. The second and third year renewals of the e-member would be eliminated. All other rates and categories remain unchanged. Effective January 1, 2018.

### **COSCA Membership**

The Committee is proposing a complimentary 2018 regular Membership to any non-NACM COSCA member. There are 56 COSCA members and only 20 are NACM members. This would be in hopes that they would renew after their 1 year complimentary membership. This would also expose many NEW COSCA members to NACM.





**National Association for Court Management/National Council of Juvenile and Family Court Judges**

**Partnership Agreement for Joint Membership**

To assist court managers with their professional development and provide added value to current and future members of the National Association for Court Management (NACM) and the National Council of Juvenile and Family Court Judges (NCJFCJ), the respective Boards of Directors of each association have agreed to the membership discounts outlined below. Members joining or renewing with both associations will receive a joint membership and dues discount on membership with both associations.

NACM and NCJFCJ are separate organizations with separate governing Boards, separate Articles of Incorporation, separate Bylaws, and separate 501(c)3 status. It is agreed that, except as outlined in this partnership agreement or specific contracts for services or a joint project, each organization's activities are separate and apart from the other, and entering into this agreement in no way precludes either organization from separately seeking funding or undertaking any activities.

Additionally, the joint membership must abide by and joint members may participate in each association as authorized by NACM's and NCJFCJ's Bylaws and articles/sections on membership.

Individuals who are members of the NCJFCJ qualify for a 20% discounted NACM regular member membership rate. In turn, individuals who are members of NACM qualify for a 17.5% (must not be less than 10%) discounted NCJFCJ associate membership rate.

The total amount of the discount for joint membership will be \$50 per member, per year, shared by the NCJFCJ and NACM as follows:

- NACM agrees to a \$25 (20%) discount for NCJFCJ members who join NACM.
- THE NCJFCJ agrees to a \$25 (17.5%) discount for NACM members who join the NCJFCJ.

	<u>Without Discount:</u>	<u>Discounted:</u>
NCJFCJ Associate Membership:	\$145	\$120 (17.5%)
NACM Regular Membership:	\$125	\$100 (20%)
<b>Total Membership Dues:</b>	<b>\$270</b>	<b>\$220 (37.5%)</b>

As part of the Partnership Agreement, the NCJFCJ and NACM agree to advertise the joint membership discount to their members.

**Current members:**

- Current NCJFCJ members wishing to take advantage of the joint membership discount with NACM shall attach a copy of their current year NCJFCJ dues receipt to their NACM invoice or application to receive the reduced NACM rate.

- Current NACM members wishing to take advantage of the joint membership discount with the NCJFCJ shall attach a copy of their NACM receipt to their NCJFCJ invoice or application to receive the reduced NCJFCJ associate membership rate.

New members:

- Individuals who are neither NCJFCJ nor NACM members shall first join the NCJFCJ noting their intent to join NACM. The reduced NCJFCJ rate will be honored and a receipt provided to attach to the NACM application to receive the NACM reduced membership rate.

**Commented [SG1]:** Can we edit this to say the following: Individuals who are neither NCJFCJ nor NACM members shall first join either association noting their intent to join the other association and take advantage of the joint membership and discount on dues. The discounted rate will be honored and a receipt provided in order to apply and join the other association and take advantage of the dues discount.

As part of the Partnership Agreement, the NCJFCJ will ensure the joint members receive the benefits offered through the NCJFCJ associate membership and NACM will ensure joint members receive the benefits offered through the NACM regular membership.

As part of the Partnership Agreement, the NCJFCJ will receive the following additional benefits from NACM:

- Complimentary NACM membership for the Chief Executive Officer of the NCJFCJ
- Complimentary listing as a Partner Association in the Court Manager, Court Express, NACM website and conference programs for the duration of this agreement to include advertising opportunities as appropriate and approved by NACM (1/4 page, two per year of this agreement)

- Requests can be made twice a year
- Send an email to [nacm@ncsc.org](mailto:nacm@ncsc.org) with the finalized communication and any other details to assist NACM in sending the communication to their membership
- Indicate that the NCJFCJ has a joint membership agreement with NACM

**Commented [SG2]:** As standard practice the NCJFCJ does not share its membership contact list. Can we amend this bullet and the same bullet under what NACM will receive to the following? On behalf of the NCJFCJ, NACM will forward to their membership via email NCJFCJ communication and information.

- Complimentary distribution area at NACM annual conference for NCJFCJ marketing materials

**Commented [SG3]:** Can we edit this to be consistent with the last bullet under what NACM will receive or are there not exhibiting opportunities at the NACM annual conference? Complimentary exhibitor booth space at the NACM annual conference.

As part of the Partnership Agreement, NACM will receive the following additional benefits from the NCJFCJ:

- Complimentary NCJFCJ Membership for the President of NACM
- Complimentary listing as a Partner Association in the IN SESSION, NCJFCJ's members only e-magazine, on the NCJFCJ website and conference programs for the duration of this agreement to include advertising opportunities as appropriate and approved by the NCJFCJ (1/4 page, two per year of this agreement)

**Commented [SG4]:** Please feel free to change this if there is a different position on the NACM Board you would like to receive the complimentary NCJFCJ membership.

- Requests can be made twice a year
- Send an email to [sgrabowska@ncjfcj.org](mailto:sgrabowska@ncjfcj.org) with the finalized communication and any other details to assist NCJFCJ in sending the communication to their membership
- Indicate that NACM has a joint membership agreement with NCJFCJ

**Commented [SG5]:** As noted above, can we amend this to: On behalf of NACM, the NCJFCJ will forward to their membership via email NACM communication and information.

- o Complimentary exhibitor booth space at the NCJFCJ annual conference

As part of the Partnership Agreement, both associations agree to keep confidential the proprietary or confidential information of the other, and agree to not sell, share, distribute or make public the membership lists or information of the other without prior approval in writing in each instance.

This Agreement will be in effect for two years from the date of the NACM president's signature and may be renewed at the end of that period. The Agreement may be rescinded by NACM or the NCJFCJ upon 60 days written notice to the other party. Unless notice to cancel is submitted in writing, it is understood that this MOU shall remain in effect during changes in leadership of either organization.

#### **NATIONAL COUNCIL OF JUVENILE AND FAMILY COURT JUDGES**

.....	.....	
DATE	ASSOCIATION Chief Executive Officer	SIGNATURE

#### **Association Contact:**

.....	.....	
NAME	EMAIL ADDRESS	PHONE



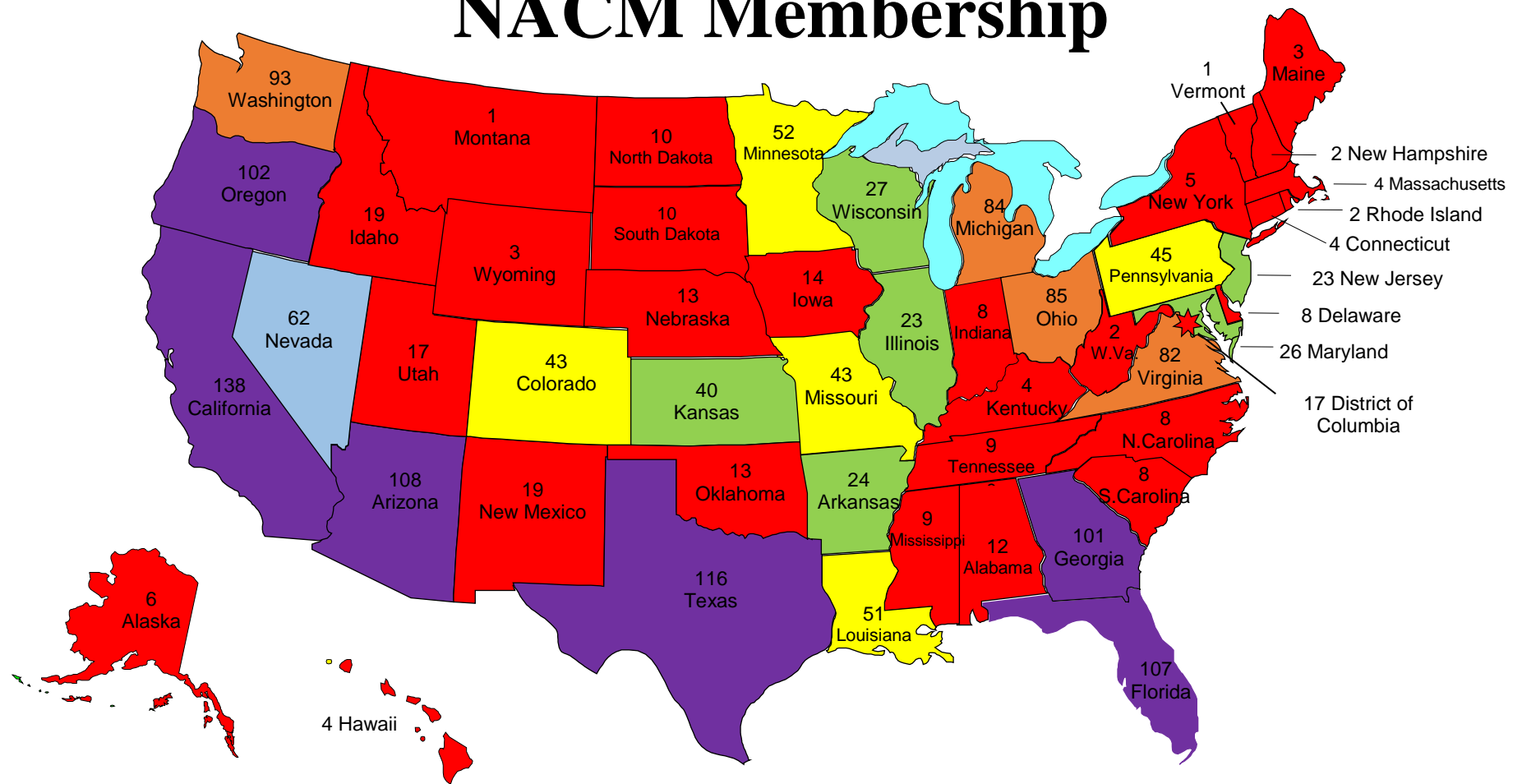
#### **NATIONAL ASSOCIATION FOR COURT MANAGEMENT (NACM)**

.....	.....	
DATE	ASSOCIATION PRESIDENT	SIGNATURE

#### **NACM Contact:**

.....	.....	
NAME	EMAIL ADDRESS	PHONE

# NACM Membership



## NACM Members

### U.S. Territories:

American Samoa	1
Armed Forces Pacific	1
Federated States of Micronesia	1
Guam	4
Northern Mariana Islands	1
Puerto Rico	1
Virgin Islands	2

### International:

Afghanistan	1
Australia	6
Canada	11
China	1
Luxembourg	1
Scotland	1
Trinidad and Tobago	1
Ukraine	2
United Arab Emirates	1

Total International - 25  
 Total U.S. and Territories - 1,719  
 Total Membership - 1,744

## Total members by state

1 to 20	Red
21 to 40	Green
41 to 60	Yellow
61 to 80	Blue
81 to 100	Orange
Over 100	Purple



**Committee Progress Report Form – 2017-2018**

**Committee: Past Presidents**

	Report	Due Date	Submission Date
X	Fall Progress Report	September 5, 2017	August 28, 2017
	Midyear Progress Report	January 16, 2018	
	Annual Progress Report	June 20, 2018	

Project	Project Status	Strategic Priority? (Yes/No)	Discussion Needed? (Yes/No)	Board Action Needed? (Yes/No)	If Yes to discussion or action, please describe what needed
Exiting Board Member Survey	NACM's exit interview <a href="#">survey</a> was sent to Stephanie Hess, Yolanda Lewis, and Judge Kevin Burke on August 27, 2017 with a return date of September 8, 2017.	No	Yes	No	Results to be discussed.

**Time needed at meeting for Committee report:** 10-15 minutes.

**Submitted by:** Scott Griffith, Immediate Past President

**Date:** August 28, 2017



**Committee Progress Report Form – 2017-2018**

**Committee:** Core

	Report	Due Date	Submission Date
X	Fall Progress Report	September 5, 2017	August 30, 2017
	Midyear Progress Report	January 16, 2018	
	Annual Progress Report	June 20, 2018	

Project	Project Status	Strategic Priority? (Yes/No)	Discussion Needed? (Yes/No)	Board Action Needed? (Yes/No)	If Yes to discussion or action, please describe what needed
Yearly Goals	Development of Goals - Attached	Yes	No	No	
Tool Kits/Self Assessments	In Development with Registered Creative to create a new page on the Core Website to bring old tool kits and self and group assessments over	Yes	Yes	Yes	Discuss quote from Registered Creative
Conference Core Session	Continued roll out of Core Curricula at conferences – next curricula has been selected	Yes	No	No	

**Time needed at meeting for Committee report: 10 minutes**

**Submitted by: Kathy Griffin**

**Date: August 30, 2017**

Goal #1: UPDATE AND MAINTAIN CORE (Website and Curriculum)	
2017-2018 Strategic Projects	Lead Person/Committee Responsible
1. Continue Review process and schedule to review and update each of the 13 curricula	Janet Cornell and Renee Danser Develop Sub-Committees for each curricula and continue process
2. Create process to review and update the <a href="#">Core website</a>	As sub-committees finish their assignments any corrections to the material will be done by the Core Chair/Vice-Chair

Goal #2: MARKETING THE CORE	
2017-2018 Strategic Projects	Lead Person/Committee Responsible
1. Create process to roll out educational sessions at conferences.	Chair will work with Conference Development Committee to continue to have a Core session at each conference.
2. Create process to market/advertise the Core materials/resources	Highlight the Core related materials and sessions at the Conferences. With the new conference app, we are adding the Core logo beside the Core session.

Goal #3: DEVELOP MATERIALS TO ENGAGE THE CORE	
2017-2018 Strategic Projects	Lead Person/Committee Responsible
1. Prepare sample .PPT presentations for each curricula	Core chair will continue to receive from authors and submit to the Core Committee for review. Once reviewed they will be added to the Resource page of the website.
2. Create <a href="#">ToolKit</a> and <a href="#">Self and Group</a> Assessment tool similar to original core competencies	
3. Develop process to solicit content for monthly newsletter	On each Committee Call if anyone has an idea for the newsletter submit to Chair for that month's posting.
4.	

Goal #4: TRACK CURRICULUM USAGE	
2017-2018 Strategic Projects	Lead Person/Committee Responsible
1. Revision was made to Core website to automatically request information (name, organization, intent of usage, contact info, can we contact you?) when downloading curricula	Sub-Committees to follow up on surveys.
2. Conduct outreach initiative to engage court community on use(s) of the Core	Work with Membership Committee on Regional Presentations regarding the Core. Scheduled to do a Core Curricula in Colorado in 2017
3.	





**Strategic Planning Report Form – 2016-2017**

<b>Strategic Focus Area</b>	<b>Goal</b>	<b>Strategic Project</b>	<b>Project Status</b>	<b>Responsible Committee</b>
Membership – Recruitment, Retention, and Engagement	NACM’s membership will be more diverse and representative of the court profession.	Reach out to new, diverse, and untapped groups and geographical regions. & Implement other innovative recruitment and retention methods and practices.	Committee member Leesa McNeil concluded her study and a new capability of LinkedIn was uncovered. Board Approved \$500 a month campaign initiative for July- November 2017	Membership
Membership – Recruitment, Retention, and Engagement	NACM will increase opportunities for members to get involved and be active	Launch new onboarding process/program for new members	Initial contact with Registered Creative on campaigns. Current NACM site does not support the infrastructure for a cohesive automated onboarding experience. This item will be carried into 2017-18.	Membership
Membership – Recruitment, Retention, and Engagement	NACM’s membership will be more diverse and representative of the court profession.	Develop recommendations and action plan for improving data collection and tracking of key NACM metrics	NACM hired a consultant to review the website as a whole. This review included an in-depth look at membership metrics and lack thereof. A discussion on a plan to move forward is pending and should include a system to help with data collection.	Membership
Membership – Recruitment, Retention, and Engagement	NACM’s membership will be more diverse and representative of the court profession.	Enhance materials that communicate the value of membership and return on investment	Janet Reid drafted a Value of Membership document. The Committee used this to assist in redesigning the membership brochure	Membership

Strategic Focus Area	Goal	Strategic Project	Project Status	Responsible Committee
Membership – Recruitment, Retention, and Engagement	NACM will increase opportunities for members to get involved and be active	Implement other innovative engagement methods and practices. (Early Career Professionals spotlight)	ECP offered a member spotlight in the <i>Court Express</i>	Membership
Education and Resources Provided by NACM	NACM’s informational resources and materials will be easily accessible, useful and reflective of emerging issues.	Improve NACM website – Phase 1: Evaluate and report on the function, purpose and use of NACM’s website	Board contracted to have an external evaluation and review of the website. Report has been received for review by the Board.	Communications
Education and Resources Provided by NACM	NACM will increase attendance at, and participation in, its educational activities.	Evaluate and make recommendations for improving/updating NACM’s existing resources	Participation increased for both the 2017 Midyear and Annual conference. A sub-committee is meeting regularly to plan transition to the electronic version of <i>The Court Manager</i> to increase usage	Communications
Education and Resources Provided by NACM	NACM’s informational resources and materials will be easily accessible, useful and reflective of emerging issues.	Provide or conduct a web-based educational program each quarter	The first webinar for 2017 was on LGBTQ awareness and the second one was on Emergency Preparedness. Both webinars a success as the registration exceeded 100 participants. Paying for GoToWebinar services only when there is a webinar and cancelling in between webinars has been cost effective. A third webinar on Court Administration is scheduled for September 2017. Electronic Guide Court Administrator guide update went out last Fall and. Domestic Violence will go out this Fall. Social	Communications

Strategic Focus Area	Goal	Strategic Project	Project Status	Responsible Committee
			media updates are done regularly.	
Association Governance	Evaluate, improve, and align Board processes, procedures and practices with operational and strategic priorities.	Early Career Professionals Scholarship Sustainability Plan	The Committee created a sustainability model for scholarships, which was reviewed and approved by the Board. The Secretary/Treasurer and Association Manager identified funding to support this effort. The plan is active and will continue in 2018.	Finance
Association Governance	Evaluate, improve, and align Board processes, procedures and practices with operational and strategic priorities.	Whistle Blower Policy Management	The Committee met with NCSC and NACM president to include a clause in contractual agreement with NCSC to cover any reported misconduct and the notification process to follow.	Finance
Association Governance	Evaluate, improve, and align Board processes, procedures and practices with operational and strategic priorities.	Review of the Association's Audit process	Board accepted a proposal to institute an industry standard three-year audit cycle. The operations manual has been updated to reflect this change. A tentative policy on the role and responsibilities of an audit committee has been created for Board review.	Finance
Education and Resources Provided by NACM	NACM's informational resources and materials will be easily accessible, useful and reflective of emerging issues	Curricula download survey	A survey has been created and is operational.	CORE
Education and	NACM's	Curricula review process	Forming small work groups. The first	CORE

Strategic Focus Area	Goal	Strategic Project	Project Status	Responsible Committee
Resources Provided by NACM	informational resources and materials will be easily accessible, useful and reflective of emerging issues		workgroup for caseflow and workflow has started its work and will complete its review in the near future. The next group will be formed to review the budget and fiscal management competency.	
Education and Resources Provided by NACM	NACM's informational resources and materials will be easily accessible, useful and reflective of emerging issues	Creation of presentations on the CORE competencies to include on the website.	Most original curricula authors have agreed to create presentations. As they are developed and approved by the committee they are placed on the website, under resources.	CORE
Education and Resources Provided by NACM	NACM's informational resources and materials will be easily accessible, useful and reflective of emerging issues	Rollout Core Educational Sessions	Two new competencies will be presented at the July 2017 conference, making a total of eight that have been presented at conferences.	CORE
Advocacy for the Profession	NACM will be an influential and respected voice on behalf of courts and the court management profession.	Develop, present and institutionalize a State of Court Management address	The inaugural address will be given on the Thursday Business Meeting at the annual conference.	Governance
Advocacy for the Profession	NACM will be an influential and respected voice on behalf of courts and the court management	Develop an "Importance of the Court Management Profession" paper	The State of the Profession address will be tweaked for an article to follow in the next <i>Court Manager</i> . The project will continue in to the next year.	Governance

Strategic Focus Area	Goal	Strategic Project	Project Status	Responsible Committee
	profession.			
Advocacy for the Profession	NACM will be an influential and respected voice on behalf of courts and the court management profession.	Develop a communication strategy to include media engagement	Resolution process being amended to include specific communication outreach. Communication on other strategic priorities on hold pending drafts and further discussion  See also articles/updates in Court Express, Court Manager, etc.	Governance
Association Governance	NACM's governance is representative, responsive, and effective.	Develop and implement an improved Board Orientation Program/Process	The Board Resource Guide is updated annually by incoming President, regular New Board Members conference calls, creation of Board mentorship by assigning "buddies", Revised Operations Manual appendices summary to also identify committee responsibilities.	Board
Association Governance	NACM's governance is representative, responsive, and effective.	Strengthen committee/team structure to align with strategic priorities	Committee Progress Reports now track Strategic Plan project status. Each committee reviews SP and priorities at beginning of year and self-identifies issues to address.	Board

**Submitted by: Greg Lambard & T.J. BeMent**

**Date: 6/27/17**



**2016 – 2019**  
**STRATEGIC PLAN AND ANNUAL PRIORITIES**  
National Association for Court Management

June 2016



*Strengthening Court Professionals*





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## Letter from NACM Leadership

On behalf of the Board of Directors, it is our pleasure to present the National Association for Court Management's (NACM) Strategic Plan for 2016–2019.

The Strategic Plan is the product of an inclusive and interactive yearlong planning process which empowered NACM to craft a measurable blueprint for the future. This plan serves as a bold and forward-thinking approach to *refining* our mission, *actualizing* our core values, and *articulating* our vision for the future.

The 2016-2019 Strategic Plan affirms the importance of four (4) priorities upon which NACM will focus: membership, education and resources, advocacy, and association governance and sustainability. These priorities build upon NACM's past successes and demonstrate the willingness to accept new challenges and opportunities that will strengthen the profession of court management for years to come. As we have evolved as an organization, so have our intentions to be more transparent, member-focused, and committed to effective governance. Recognizing emerging trends, this plan seeks to operationalize NACM's fundamental mission to be a *voice* for court professionals and an effective resource to the court community at large.

We want to thank the more than 200 court management professionals across the country who dedicated time and feedback in the development of this plan. There is still much work to be done. As we move forward together, the continued interest and engagement of our members and stakeholders are of vital importance. As a Board, we hope that you will examine the Strategic Plan as an actionable roadmap which compels you to remain engaged and invested in NACM's future as the premier organization for the profession of court management.

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## Acknowledgements

The Strategic Plan was largely developed by the NACM Board of Directors and the Strategic Plan Workgroup. A number of individuals devoted countless hours to the planning process:

### 2015-2016 Board of Directors

#### Officers:

##### *President*

Stephanie Hess

##### *President Elect*

Scott C. Griffith

##### *Vice President*

Vicky L. Carlson

##### *Secretary/Treasurer*

Yolanda L. Lewis

##### *Immediate Past President*

Michele Oken

#### Directors:

Tracy J. BeMent

Hon. Kevin Burke

Jeff Chapple

Renee L. Danser

Paul DeLosh

Howard Gentry

Kathryn Griffin

Shakeba Johnson

Dawn Palermo

Dexter Thomas

### Strategic Plan Workgroup

Paul DeLosh, Chair

Michele Oken, Vice Chair

#### Members:

Kevin Bowling

Mark Dalton

Renee Danser

Judge Del Preore

Stephanie Hess

Bob James

Greg Lambard

Lyn Malloy

Cyril Miller

Dawn Palermo

Tracy Schatza

Dexter Thomas

Patti Tobias

Chelle Uecker

Mark Weinberg

### 2015 Strategic Planning Survey and Online Focus Groups:

Thanks to representatives from each of NACM's permanent and standing committees, Past Presidents' Committee, Early Career Professionals Committee, and new NACM Members for participating in the planning process.

### Special Thanks:

NACM extends a special thanks to Mary McQueen, President of the National Center for State Court (NCSC) and all of the NCSC's staff for their support and direction throughout the planning process. In addition, we would like to offer a special sentiment of thanks to Brenda Wagenknecht-Ivey for sharing her wealth of experience and invaluable leadership in the creation of NACM's 2016-2019 Strategic Plan.



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# 2016-2019 Strategic Plan

June, 2016

## Section 1: Overview

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The NACM Board of Directors is pleased to present NACM's updated 2016-2019 Strategic Plan. The Strategic Plan, which was developed with input from many court management professionals from across the county, lays out strategic priorities for NACM, and a roadmap for continuing to serve members and lead and advance the court management profession. The Board is excited to work with the membership and its partners on these important priorities and looks forward to sharing progress and accomplishments in the coming years.

NACM began the strategic planning process in the fall of 2015 and completed this Strategic Plan in early 2016. Facilitated by Dr. Brenda Wagenknecht-Ivey of PRAXIS Consulting, Inc., the process included a thoughtful examination of relevant trends, emerging issues, strengths and weaknesses of NACM, and opportunities and threats facing the profession and the Association (see the Appendices for details).

With input from over 200 court management professionals through online focus groups and a strategic planning survey in the fall of 2015, the Board refreshed its mission and vision statements, identified core values, identified four key strategic focus areas, and developed comprehensive strategies for making continued changes and improvements. It also identified annual priorities, which will be reviewed and updated each year.

The Strategic Plan includes:

1. Revised mission and vision statements and newly developed core values;
2. Strategic focus areas, goals, and strategies; and
3. Strategic projects/initiatives.

The Board also evaluated and refined its implementation approach. It includes assigning strategic initiatives to specific permanent and standing committees or newly formed strategic action teams; refining the membership and leadership of the teams; clarifying roles and expectations of committee chairs, team leaders, and members; and using new tools and templates to guide the work on the strategic initiatives and report on the progress and accomplishments.

## Section 2: Mission, Vision, and Core Values

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### New Tagline

Strengthening court professionals

### Mission of NACM

NACM is a member organization dedicated to educating court professionals, providing community, sharing information, and advocating on important court and justice system topics.

### Vision of NACM

NACM will be a preferred source for education and innovative practices and a leading voice for the court management profession.

### Core Values of NACM

Core values are fundamental beliefs that guide behavior and action. NACM's core values encompass basic principles for guiding NACM's performance as well as its internal and external relationships. NACM is the **VOICE** of the profession and succeeds by:

Vision – providing strategic focus on the advancement of the field of court administration

Organization – leading the Association in the pursuit of collective goals

Implementation – taking action and following-through on strategic priorities

Communication – engaging the court community and justice partners

Ethics – demonstrating integrity and adhering to the highest ethical standards

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### Section 3: Strategic Focus Areas (SFAs), Goals, and Strategies

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Overview of Trends Analysis. The Board, with the assistance of nearly 50 court professionals that participated in the online focus group sessions, reviewed a variety of relevant external and internal trends. External trends included social/demographic, economic, policy/political, technological and justice system. Association benchmarks from a national study<sup>1</sup> were also reviewed. Finally, internal trends of NACM, such as membership and conference attendance, were analyzed.

The trends analysis was revealing. Below is a brief summary of the implications of the trends on NACM. (See Appendix A for complete details.) In the future, NACM must:

1. Stay abreast of current, complex, and emerging issues/topics facing courts;
2. Be aware of the changing workforce;
3. Adapt its services and products/resources to meet the changing needs of members/potential members and the court management profession;
4. Continue to develop and better use technology to reach and engage members and deliver products and services;
5. Continue to increase, retain, and engage members;
6. Continue to be a strong leader for the profession; and
7. Be nimble and responsive.

Overview of Organizational Assessment. The Board, with the assistance of over 125 active and new NACM members, completed a comprehensive organizational assessment as part of the planning process. It included a 2015 Strategic Planning Survey as well as a critical analysis of strengths, weaknesses, opportunities and threats. This analysis was instrumental in assisting the Board in identifying new SFAs and setting priorities for the coming years. (See Appendix B for a summary of the 2015 Strategic Planning Survey and additional details)

Strategic Focus Areas (SFAs), Targets, and Strategies. The Board identified the following four SFAs, informed by the data and information mentioned above. Each SFA is fundamentally important to NACM's short and long-term success. Below are brief descriptions, goals and strategies for making continued improvements.

NACM's annual strategic projects in each of these areas are presented in Section 4.

**Strategic Focus Areas  
(2016)**

1. Membership – Recruitment, Retention, and Engagement
2. Education and Resources Provided by NACM
3. Advocacy for the Profession
4. Association Governance and Sustainability

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<sup>1</sup> Marketing General, Inc., Annual Marketing Benchmarking Report (2015).



## **SFA #1: Membership – Recruitment, Retention, and Engagement**

### **Description**

NACM is a member organization serving court professionals and the court management profession. To remain a vibrant and leading organization, NACM must attract new members and retain and engage existing members. NACM is committed to strengthening these efforts in the future. Per the 2015 Strategic Planning Survey, suggestions included:

1. Improve membership data/information (e.g., demographics, numbers);
2. Clearly define and communicate the value of membership (e.g., ROI);
3. Reach out to new, diverse, and untapped groups and geographical regions;
4. Welcome and orient new members more effectively (e.g., strengthen “onboarding program”);
5. Promote and enhance networking opportunities and build community;
6. Use a variety of methods to connect and communicate with members; and
7. Involve and engage members in the work of NACM.

### **Goals/Targets and Strategies**

GOAL 1: NACM’s membership will be more diverse and representative of the court profession.

Strategies:

- a. Assess and respond to the needs and interests of members.
- a. Improve and track membership data/information and other metrics.
- b. Define and communicate the value of membership.
- c. Reach out to new, diverse, and untapped groups and geographical regions.
- d. Work with other groups to reach court professionals and educate about NACM.
- e. Strengthen practices for welcoming and orienting new members.
- f. Promote the court professional community.
- g. Enhance networking opportunities.
- h. Implement other innovative recruitment and retention methods and practices.

GOAL 2: NACM will increase opportunities for members to get involved and be active.

Strategies:

- a. Communicate and promote opportunities for involvement.
- b. Implement other innovative engagement methods and practices.

See the next section of the Strategic Plan for a list of NACM’s annual initiatives for this SFA.

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## **SFA #2: Education and Resources Provided by NACM**

### **Description**

NACM provides an array of educational programs and resources. NACM also produces informational and reference materials that advance the profession and educate others about courts. Examples include educational conferences, webinars, the Court Manager and Court Express, the Core® and related curriculum, the National Agenda, and other publications and guides on best practices.

Enhancing member benefits and increasing the overall value of belonging to the Association are high priorities for NACM. NACM also is committed to producing resources (e.g., guides, tool kits, the Core® curriculum, best practices, and trends in courts) that will strengthen court and justice system performance and serve the profession. Suggestions provided (responses from the 2015 Strategic Planning Survey) for enhancing educational programming, services, and resources include:

1. Assess the needs and interests of court professionals generally and members specifically.
2. Add new educational programming, services, and resources to meet current and emerging needs.
3. Evaluate and enhance existing member services and resources.
4. Enhance and add services that will add value for members and potential members.
5. Continue to strengthen educational programming.
6. Compile information and share best practices.
7. Anticipate and be a thought-leader on hot topics, emerging issues, and promising practices

### **Goals/Targets and Strategies:**

#### **GOAL 1: NACM will increase attendance at, and participation in, its educational activities.**

##### **Strategies:**

- a. Evaluate and continuously improve educational programming.
- b. Provide educational programming on the Core®, hot topics, and emerging issues.
- c. Expand educational offerings to meet needs and interests of diverse membership segments.
- d. Promote high-quality diverse faculty.
- e. Be strategic and intentional when selecting conference locations.
- f. Use technology/alternative delivery methods to expand access to or participation in educational activities.
- g. Partner with other organizations to increase participation in educational events.

#### **GOAL 2: NACM's informational resources and materials will be easily accessible, useful and reflective of emerging issues.**

##### **Strategies:**

- a. Evaluate and improve existing resources.
- b. Develop new resources and informational materials to improve court administration and court/justice system performance.
- c. Be a thought-leader and produce resources/reference materials on hot topics, emerging, issues, and promising practices.
- d. Market/communicate the availability of resources.

- e. Increase accessibility to resources/informational materials.

See the next section of the Strategic Plan for a list of NACM's annual initiatives for this SFA.

### **SFA #3: Advocacy for the Profession**

#### **Description**

The court management profession plays a vital role in the administration of justice. Like other judicial and legal organizations committed to building trust and confidence in the judicial branch, NACM is in a singular and prominent position to be the voice for the court management profession and provide a unique perspective on court operations and innovative practices. NACM is dedicated to promoting, advancing, and advocating for the profession. Being a voice for the profession includes:

1. Providing education about courts, court and judicial branch issues, and the profession.
2. Being a spokesperson contributing to national policies and the national agenda.
3. Identifying and leading on key issues pertinent to courts and the judicial branch.
4. Collaborating with other organizations and associations committed to promoting justice and building trust and confidence in courts.
5. Strengthening existing, and forming new, partnerships to promote and advance the profession.

#### **Goals/Targets and Strategies:**

GOAL 1: NACM will be an influential and respected voice on behalf of courts and the court management profession.

##### Strategies:

- a. Pursue and participate in opportunities to educate about, and promote, the profession.
- b. Reach out to policy-makers to educate about the needs and important issues facing courts and the profession.
- c. Take a position and make recommendations on matters of importance.
- d. Develop advocacy resources and reference materials.
- e. Use innovative methods for acting on behalf of the profession.
- f. Educate and enhance relationships and communication with judges, judge organizations, and judicial/legal communities.
- g. Highlight contributions to improved court/judicial branch performance.

See the next section of the Strategic Plan for a list of NACM's annual initiatives for this SFA.

### **SFA #4: Association Governance**

#### **Description**

The governance structure of NACM must be responsive and effective to enable the Board to lead and act on behalf of the Association, members, and the profession. The Board is committed to ensuring that NACM's leadership:

1. Is representative and diverse.
2. Is able to respond quickly to needs/demands.
3. Is strategic and intentional in its actions.
4. Is structured and organized to manage the daily business of the Association as well as achieve

- 
- long-term goals and strategic priorities.
5. Clearly defines, shares, and balances the workload across committees and work groups.
  6. Is stable and consistent in its governance activities as individuals in positions of leadership rotate.
  7. Has adequate secretariat support services.

### **Goals/Targets and Strategies**

#### GOAL 1: NACM's governance is representative, responsive, and effective.

##### Strategies:

- a. Improve the process for recruiting diverse, skilled, and enthusiastic Board and committee members
- b. Orient, develop, and nurture board and committee members
- c. Strengthen the cohesiveness and collaboration of the Board
- d. Evaluate, improve, and align Board processes, procedures and practices with operational and strategic priorities.
- e. Improve and realign committee structure and workload
- f. Form project teams to achieve long range goals and strategic priorities

See the next section of the Strategic Plan for a list of NACM's annual initiatives for this SFA.

## Section 4: Annual Strategic Projects

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This Section presents NACM's annual strategic initiatives and/or priority projects. It will be updated annually when NACM establishes new strategic priorities.

### Strategic Focus Area #1:

<b>Strategic Focus Area #1: Membership – Recruitment, Retention, and Engagement</b>	
<b>2016-2017 Strategic Projects</b>	<b>Lead Person/Committee Responsible</b>
1. Conduct recruitment campaign targeting states with low membership	Membership Committee
2. Launch new onboarding process/program for new members	Membership Committee
3. Develop recommendations and action plan for improving data collection and tracking of key NACM metrics (such as demographics of NACM membership, tracking other vital data/metrics – start with those related to strategic projects)	Membership Committee
4. Enhance materials that communicate the value of membership and return on investment	Membership Committee

### Strategic Focus Area #2:

<b>Strategic Focus Area #2: Education and Resources Provided by NACM</b>	
<b>2016-2017 Strategic Projects</b>	<b>Lead Person/Committee Responsible</b>
1. Improve NACM website – Phase 1: Evaluate and report on the function, purpose and use of NACM's website	Communications Committee
2. Evaluate and make recommendations for improving/updating NACM's existing resources	Communications Committee
3. Provide or conduct a web-based educational program each quarter	Communications Committee

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**Strategic Focus Area #3:**

<b>Strategic Focus Area #3: Advocacy for the Profession</b>	
<b>2016 Strategic Projects</b>	<b>Lead Person/Committee Responsible</b>
1. Develop, present and institutionalize a State of Court Management address	Governance Committee
2. Develop an “Importance of the Court Management Profession” paper	Governance Committee
3. Develop a communication strategy to include media engagement	Governance Committee

**Strategic Focus Area #4:**

<b>Strategic Focus Area #4: Association Governance and Sustainability</b>	
<b>2016-2017 Strategic Projects</b>	<b>Lead Person/Committee Responsible</b>
1. Develop and implement an improved Board Orientation Program/Process	Board
2. Strengthen committee/team structure to align with strategic priorities	Board

## Section 5: Implementation Approach

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NACM has a long history of using committees to work on special projects and conduct the business of the Association. As the Board prepares to begin working on its new Strategic Plan, it also is refining the implementation approach.

First, the Board will critically review the charge and expectations of its four standing committees. Refinements will be made as needed to the membership, size, and expectations of these committees.

Second, the Board will assign the annual strategic projects to an existing committee or a newly formed strategic action team. Each committee or team will have a chair/team leader to guide and facilitate the work on assigned strategic projects. As needed, a small number of people will be recruited and assigned to work on the strategic projects. The strategic action teams will be given a clear charge, expectations, and timeline for completing their project(s) (e.g., 12 months). The action teams will be encouraged to complete an Implementation or Action Plan for their respective project(s) laying out the tasks, timeline, and assignments. The Implementation Plan will serve as a roadmap for completing the project.

Third, the strategic action teams/committees will report their progress regularly to NACM's leadership using a simple reporting form and/or by participating in meetings/conference calls. The status of the strategic projects (e.g., milestones achieved), problems encountered, and next quarter activities will be among the information provided to the Board.

In addition to the above, the Board will recalibrate the timing of identifying and beginning work on its strategic projects with the election of new board members and its fall meeting. The first year's strategic projects were identified at a strategic planning session combined with the mid-year meeting (February). However, future strategic projects may be identified at the Board's fall meeting when time can be set aside to think and plan strategically for NACM and so work on the strategic projects can begin earlier in the election cycle.

Finally, NACM's strategic plan is expected to guide the Board's work and priorities for 3-4 years. It will be reviewed and updated annually (as needed). NACM's strategic plan will be overhauled when conditions and priorities change or at the end of 3-4 years, whichever comes first. Each year the Board will identify and celebrate accomplishments on the strategic projects for the past year and establish new strategic projects consistent with the goals and objectives for coming year. This continuous cycle will ensure the Board has its eye on the long term and strategic priorities and makes measured progress each year toward its long range goals.



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## **Appendices**

## **APPENDIX A: Trends Analysis – Future Implications**

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Many internal and external trends were reviewed and analyzed as part of the strategic planning process. Social/demographic, economic, policy/political, technological, and justice system trends were among those reviewed. Also reviewed were national association benchmarks and internal trends of NACM such as membership and conference attendance. Finally, the implications of the trends for NACM were identified.

The five online focus group sessions were instrumental in completing the trends analysis and identifying implications for NACM.<sup>2</sup> Nearly 50 court professionals from across the US participated in the focus group sessions, which were conducted in September 2015. Below are:

1. A list of external trends affecting NACM and the projected future implications for NACM;
2. NACM membership and conference attendance trends; and
3. Benchmarks from a national study of membership associations.

### **External Trends and Implications for NACM**

The list of trends below is believed to be most relevant to NACM. That is, the list below is NOT exhaustive, but rather represents the trends believed to be most relevant to court managers, the court management profession, and ultimately NACM in the coming years. Following the list of trends is a summary of implications for NACM as identified and discussed during the online focus group sessions and a strategic planning session conducted with the NACM Board in November of 2015.

#### **Social/Demographic Trends:**

1. Aging population and workforce
2. Shifting and mobile population
3. Shortage of workers in some industries
4. Increasing competition for skilled/talented workers
5. Increasing service demands/expectations of the public (e.g., 24/7, over the Internet, faster services, consumers are more informed)
6. Changing work and life style choices (e.g., working virtually, work/life balance, increasing desire for flexible hours)
7. Explosion in the use of social media and networking as a way to maintain connections, communicate, and do business
8. Increasing awareness of environmental issues and push for “going green”

#### **Economic:**

9. Slow economic recovery
10. Stagnating public sector budgets
11. Declining unemployment rates
12. Growing gap between wealthy and persons living in poverty
13. Increasing cost of education – increasing debt

#### **Policy/Political:**

14. Continued polarization and gridlock among the major political parties
15. Declining or stagnating state and local budgets; depleted reserves
16. Continued scrutiny on how public tax dollars are spent

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<sup>2</sup> The five focus groups were with: (1) Past Presidents; (2) committee chairs and vice chairs; (3) committee members; (4) early career professionals; and (5) new NACM members.

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17. Continuing debate and focus on hot topics/pressing issues – same sex marriage, legalization of marijuana, human trafficking, immigration reform, health care reform, etc.
  18. Increasing pressure to consolidate and/or regionalize services
  19. Increase in legislation for specific crimes and unfunded mandates
  20. Growing tension between increasing expectations for government solutions and the call for less government involvement in personal lives

Technological:

21. Continuing wireless revolution and rapidly developing telecommunications/information technology
22. Increasing inability to unplug, tune out, or turn off
23. Growing divide between “digital natives” (the youngest generation) and everyone else
24. Expectation/demand for 24x7 access and services (e.g., e-everything, easy access from anywhere at any time)
25. More distance learning and virtual/video-conferencing meetings – changing delivery systems and models
26. Continued need for, and progress in, networking and sharing of appropriate information
27. Increasing/continued threat of cyber attacks
28. Increasing focus on privacy rights – concerns about sensitive data

Court/Justice System:

29. Declining/stagnating funding at state and local levels
30. Changing composition of court users
31. Increasing and changing caseloads/workloads (e.g., increase in some case types, decrease in other case types, increasing need for litigant assistance, more fee waiver requests)
32. Increasing needs of litigants (e.g., self-represented litigants, reasonable accommodations for participation, mental health issues, substance abuse)
33. Increasing need for language access and services (e.g., information in multiple languages, interpreter and translator services)
34. Increasing numbers of specialty courts (e.g., drug, mental health, veterans, etc.)
35. Increasing emphasis on procedural justice/fairness – and improving the appearance of fairness
36. Declining number of jury trials (in some jurisdictions)
37. Increase in the use of alternative/innovative methods of dispute resolution (e.g., mediation, arbitration, restorative justice)
38. Increasing use of evidence-based/promising practices to achieve more effective outcomes
39. Increasing need/demand for the use of technology to enhance access and enable doing business remotely/electronically
40. Increase in paperless systems/digital records
41. Declining trust and confidence in the justice/judicial system – increasing conflict/divide among races
42. Graying workforce, especially among administrators/managers; lack of “ready-now” successors
43. Difficulty recruiting people who want to make a career of court management and leadership
44. Fewer degree programs educating young people about courts and court management; more programs focusing on criminal justice – probation, law enforcement, etc.
45. Increasing numbers of professional knowledge workers and fewer administrative/clerical workers
46. Growing emphasis on employee engagement and maintaining a satisfying work environment as a way to enhance performance and retain skilled workers

47. Declining court infrastructure (e.g., facilities, technology, equipment, security)
48. Increasing collaboration among justice system partners to address system-wide issues
49. Re-examination of judicial branch governance structures at the state and local levels; changing roles of administrators/judges
50. Continued scrutiny and criticism of the judicial branch generally; growing interest and scrutiny from the press
51. Criminal justice system reform (e.g., pre-trial practices, moving people from prison to jails)

### **Implications for NACM**

The trends listed above (and others) will affect courts in many ways. To identify the potential effects for NACM, it is critically important to extend beyond the implications of the trends on courts. Specifically, it is important to consider the effects of the trends on NACM's members, the profession as a whole, and ultimately on the Association. Doing so will ensure the discussion is focused on what NACM can do to proactively shape, and respond effectively to, the many trends.

Below is a summary of potential implications for NACM as discussed in the online focus groups –

1. NACM must stay abreast of current, complex, and emerging issues/topics facing courts. To remain relevant, NACM must remain close to, on top of, and lead around complex issues facing courts. Examples of issues include: increasing public and court user expectations, growing and changing needs of court users, delivering more and better services with existing or declining budgets, changing caseloads, resolving complex legal issues, implementing innovative programs and services; keeping pace with rapidly changing technology, operating in a challenging political climate, recruiting and retaining skilled staff, resolving cases in a fair and timely manner, and building the public's trust and confidence to name a few. NACM must keep its pulse on and continually provide the court management profession with information, education, and resources to anticipate, respond to, and solve these complex and changing issues.
2. NACM must be aware of the changing workforce. The composition of the workforce is changing. For the first time in history, five generations are (or will be) working side by side, adding complexities to managing and leading effectively. Additionally, the workforce is aging. Many court managers are eligible to retire now or soon. Courts will be vulnerable unless they are developing the next generation of court managers and proactively preparing for succession. Developing future leaders and managers and being aware of and responsive to the contemporary workforce are critically important.
3. NACM must adapt its services and products/resources to meet the changing needs of members/potential members and the court management profession. To remain relevant and viable, NACM must adapt its services and products in response to changing times and emerging needs. NACM must continuously improve, expand, and modify services to meet the needs of the court management profession, members, and potential members. For example, it is important for NACM to: provide educational programs, resource materials, and publications on the Core and hot topics; share best practices; track trends; etc. NACM will need to clearly define itself and establish priorities so it is able to: (1) retain and grow membership by meeting identified needs and interests and/or (2) target products and services to NACM's diverse and changing membership (e.g., from various states and countries, different size courts, different ages, races, and ethnicities, etc.)
4. NACM must continue to develop and better use technology to reach and engage new members and deliver products and services. A technological revolution is underway; it will continue in the

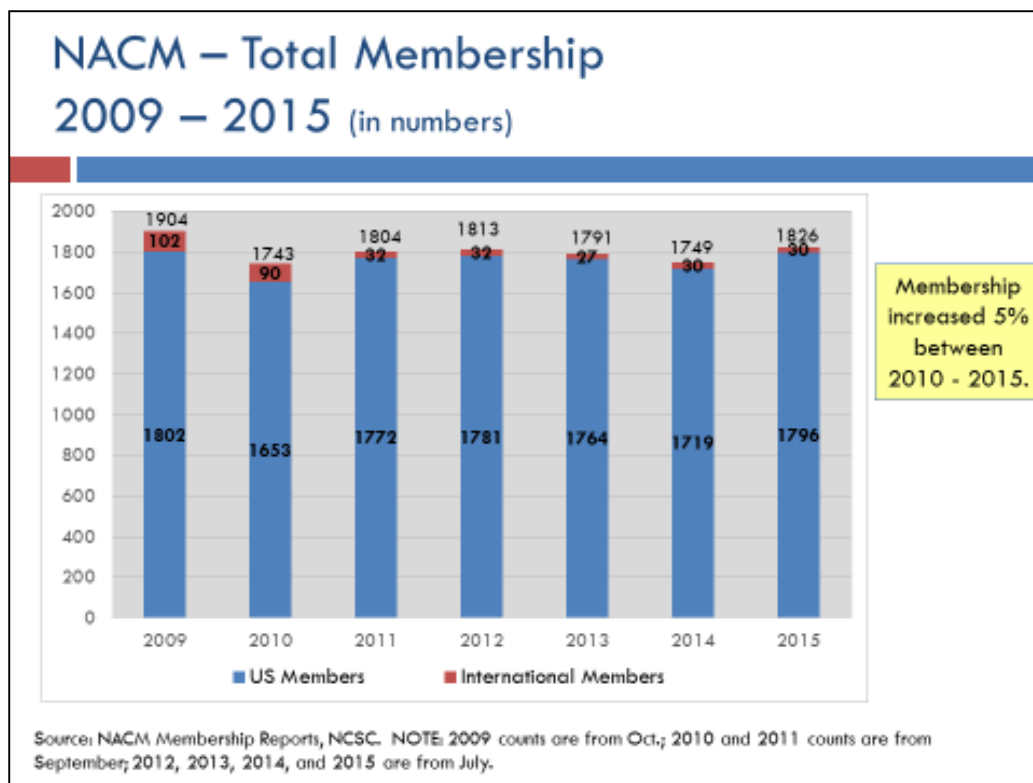
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future. Changes and advances are occurring at breakneck speed. NACM must develop and better use technology (e.g., webinars, live streaming, the website, electronic communication, social media, etc.) to enhance services and engage members. NACM's products and services can be more accessible – real time, electronic formats, 24X7 access – to members and potential members by fully using and integrating technology into the fabric of NACM. Forming and expanding partnerships and pursuing new strategies are needed.

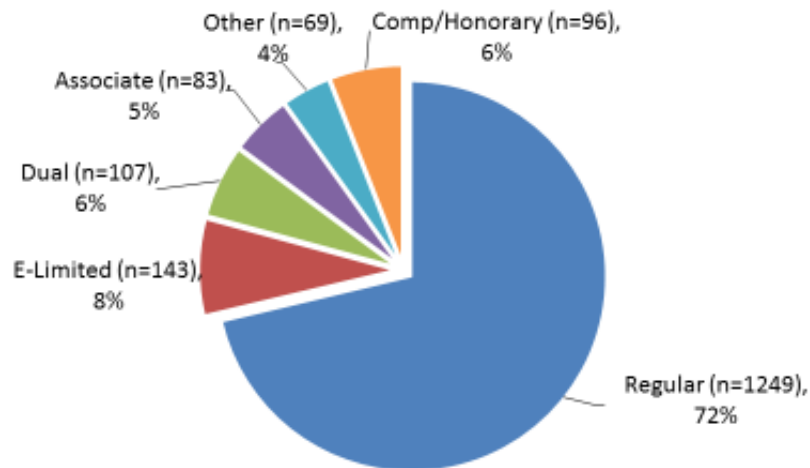
5. NACM must continue to grow and retain membership. As a professional association serving members and the court management profession, NACM's lifeline is in growing and retaining its members. It will need to critically assess and explore ways to increase and retain members. Specifically, NACM will need effective and innovative marketing strategies to attract new members. It also will need effective and innovating retention strategies. This includes ensuring membership is affordable, providing and demonstrating value (i.e., return on investment), developing effective and compelling messages, using multiple media, and forming and/or leveraging partnerships. Finally, NACM will need to improve data collection and analysis. It will need to be able to capture and extract relevant data to establish a baseline, measure progress on initiatives, evaluate membership trends, etc.
6. NACM must continue to be a strong leader for the profession. NACM is positioned to be a strong leader – voice of and advocate for – the court management profession. By leveraging its relationships, partnerships, and collaborative values, NACM can fill a leadership void and be a unifier of voices for members, the profession, and important issues facing courts (e.g., budget/funding issues, purpose of courts, building public trust and confidence, etc.). It also can educate others on topics important to the profession and courts.
7. NACM must be nimble and responsive. The Association must be able to respond quickly to changing times and emerging issues. NACM's governance structure (e.g., Board, committees, etc.) and policy making and business practices must promote agility and responsiveness in order to effectively lead and advocate for the profession, courts, and members. The Board must continue to recruit and train effective, innovative leaders who have a passion for and are committed to improving the profession and the Association.

## NACM Membership and Conference Attendance Trends

Below are membership and conference attendance trends of NACM – 2009 - 2015.

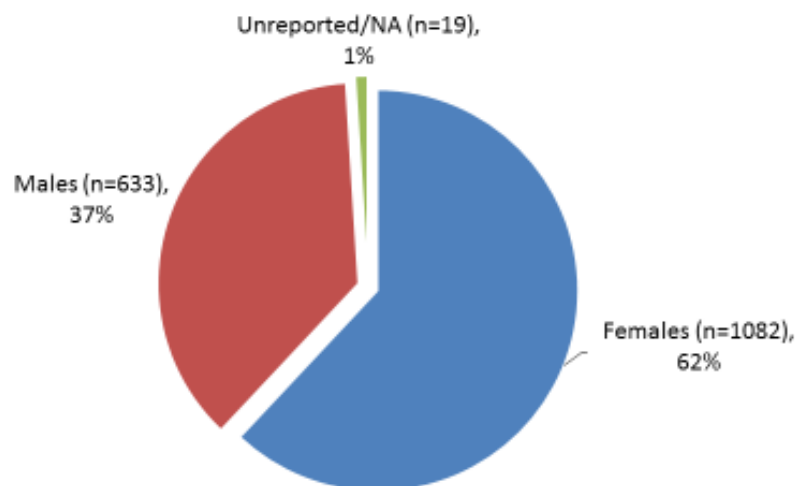


## NACM Membership – By Type of Membership July 2015 (in percentages; n=1747)



Source: NACM Membership Reports, NCSC. Percentages may not equal 100% due to rounding.

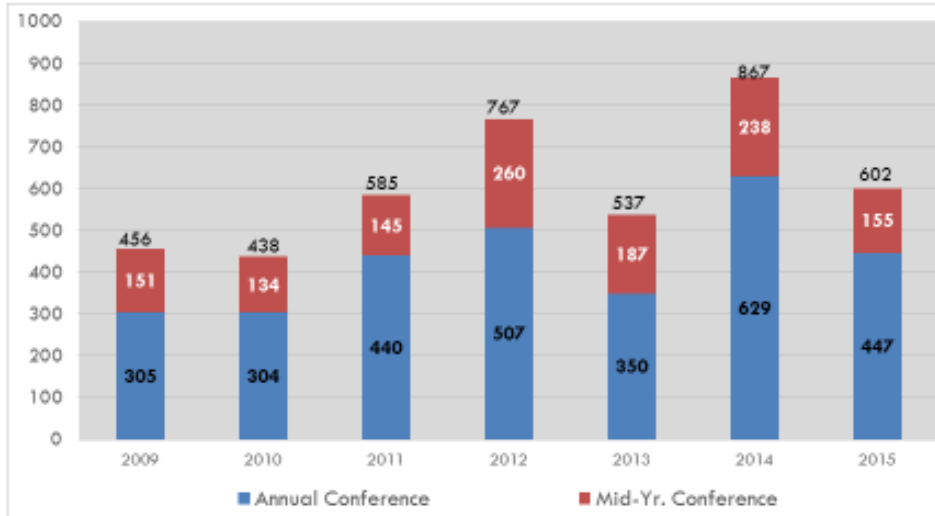
## NACM Membership – By Gender October 2015 (in percentages; n=1734)



Source: NACM Membership Reports, NCSC. Percentages may not equal 100% due to rounding.

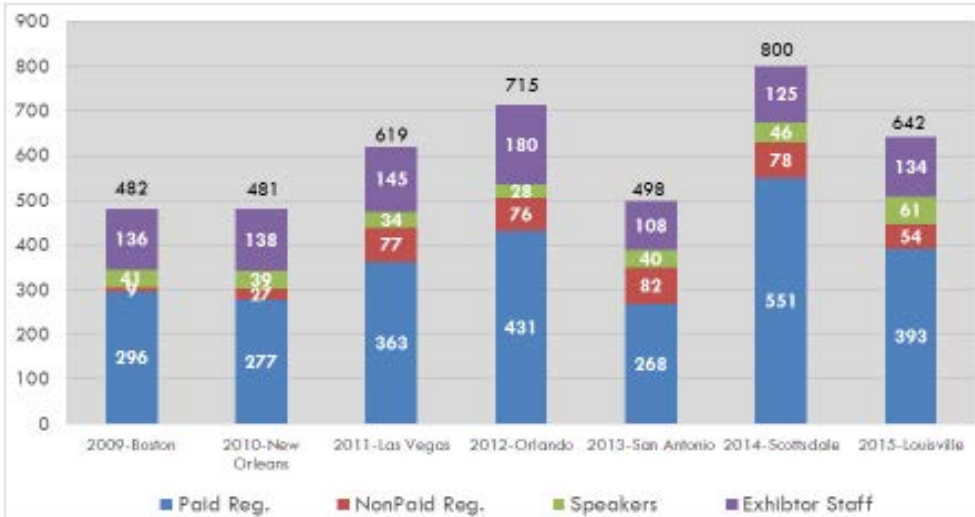


## NACM – Total Conference Attendance - Annual and Mid-Year Conferences Combined - 2009 – 2015<sup>1</sup> (in numbers)



<sup>1</sup> Includes only paid and non-paid registrations. Speakers and exhibitor staff are excluded from the counts.  
Source: NACM Membership Reports, NCSC.

## NACM – Annual Conference Attendance<sup>1</sup> 2009 – 2015 (in numbers)



<sup>1</sup> Includes all conference attendees – paid registrations, non-paid registrations, speakers, and exhibitor staff.  
Source: NACM Membership Reports, NCSC.

## NACM – Mid-Year Conference Attendance<sup>1</sup> 2009 – 2015 (in numbers)



<sup>1</sup> Includes all conference attendees – paid registrations, non-paid registrations, speakers, and exhibitor staff.  
Source: NACM Membership Reports, NCSC.

### National Association Trends and Benchmarks

Below are association trends and/or benchmarks from national studies.<sup>3</sup>

#### Membership trends – Past Year:

1. In 2015, 47% of individual member associations experienced an increase in membership. (26% experienced a decrease in membership and 25% remained the same). In 2014, 53% reported membership growth.
2. The average (mean) percent increase in membership over the past year for individual member associations was 7%. The median percent increase was 5% over the past year. (Note: median represents the midpoint where half are above and half are below).
3. Of the individual member associations that increased membership, 64% increased membership by 1-5% over the past year; 22% increased membership by 6-10%.

<sup>3</sup> The trends/benchmarks presented in this section are from two leading sources: (1) Marketing General, Inc. and (2) American Society of Association Executives (ASAE). Marketing General, Inc. produces annual Marketing Benchmarking Reports of individual membership, trade, and combination associations for purposes of evaluating marketing strategies and tactics.

#### Membership Trends – Past 5 Years:

4. Over the past 5 years, 50% of individual associations reported growth in membership (and 31% reported a decline in membership).
5. The average (mean) increase in membership for individual member associations over the past 5 years was 24%. The median percent increase was 15%.

#### Two Primary Components of Membership Growth – Member Acquisition and Member Renewal

##### Member Acquisition.

6. From 2014-2015, 44% of individual member associations experienced an increase in newly acquired members.
7. The average (mean) increase in newly acquired members was 11%. The median percent increase for newly acquired members was 6%.

##### Member Renewal/Retention.

8. From 2014-2015, only 21% of individual member associations reported an increase in renewal rates/member retention (45% remained the same and 24% reported a decrease).
9. The average (mean) increase in member renewal rates was 7%. The median percent increase in member renewal rates was 3%.

#### Overall Membership Renewal Rates

10. The average (mean) *overall membership* renewal rate for individual member associations was 79%. The median overall membership renewal rate was 82%.
11. The average (mean) renewal rate for *first year members* was 64%. The median renewal rate for first year members was 65%.
12. According to the American Society of Association Executives (ASAE), the average retention rate of professional associations is 82-90%.

Finally, below are:

- Biggest challenges for growing membership;
- Strategies for creating brand awareness;
- Recruitment strategies that yield the most new members;
- Reasons why people join associations and why they fail to renew;
- How associations use social media; and
- Biggest concerns of associations.

## Biggest Challenges for Growing Membership<sup>1</sup> (in order of priority)

1. Difficulty in communicating value
2. Difficulty attracting and/or maintaining younger members
3. Competitive Associations/sources of information
4. Declining member/employer budgets
5. Tie: Insufficient staff, membership too diverse, economy/cost of membership

	2015: Annual Dues
Average	\$320
Median	\$193
Most	\$100-\$149

<sup>1</sup> Marketing General, Inc., 2015 Membership Marketing Benchmarking Report. Statistics reported are for individual member associations.

## Creating Brand Awareness and Effective Recruitment/Marketing Channels<sup>1</sup> (in order of priority)

### Top Ways for Creating Brand Awareness:

1. Email
2. Association Website
3. Word of mouth recommendations
4. Direct Mail
5. Association sponsored social networking sites (e.g., Facebook, LinkedIn, etc.)

### Recruitment Strategies that Yield Most New Members:

1. Word of mouth recommendations
2. Email<sup>2</sup>
3. Direct Mail<sup>2</sup>
4. Association Website
5. Cross-sell to non-members who attend conferences, etc.

<sup>1</sup> Marketing General, Inc., 2015 Membership Marketing Benchmarking Report. Reported for individual member assocos.

<sup>2</sup> Email and direct mail are the top marketing strategies for renewals and are most effective for reinstating lapsed members.

## Reasons for Joining Associations and Failure to Renew<sup>1</sup> (in order of priority)

### Reasons for Joining:

1. Networking
2. Continuing Education
3. Access to specialized/  
current information
4. Advocacy

### Reasons for Failing to Renew:

1. Employer won't pay/  
stopped paying dues
2. Left profession
3. Lack of engagement with  
organization
4. Perceived value: could not  
justify membership cost  
with ROI

<sup>1</sup> Marketing General, Inc., 2015 Membership Marketing Benchmarking Report. Information reported is for individual member associations.

## Social Media<sup>1</sup>

### □ Social Media Used:

- 91% use Facebook
- 87% - Twitter
- 60% - LinkedIn
- 56% - YouTube.

### □ Purpose:

- Provide association news
- Promote association events

<sup>1</sup> Marketing General, Inc., 2015 Membership Marketing Benchmarking Report.

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## Biggest Concerns:<sup>1</sup>

(not in priority order)

- Attracting and retaining members
- Challenges to revenue sources
- Creating new ways to add value to membership
- Lack of data/stats
- Developing an effective membership development strategy
- Remaining relevant
- Aging membership

<sup>1</sup> Marketing General, Inc., 2015 Membership Marketing Benchmarking Report.

## **APPENDIX B: Organizational Assessment and Summary of 2015 Strategic Planning Survey**

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This section presents a summary of the 2015 Strategic Planning Survey. Also presented below is a summary of strengths, weaknesses, opportunities, and threats identified by the Board at the November (2015) strategic planning session.

### **Overview**

The purpose of the 2015 Strategic Planning Survey was to gather input for use by NACM's Board in updating NACM's Strategic Plan. The survey results were used to help shape the future direction, goals, and strategic priorities of NACM. The survey was administered in August 2015 by Dr. Brenda J. Wagenknecht, CEO of PRAXIS Consulting, Inc. The survey was sent to 280 people including Board members, committee members, past presidents, early career professionals, state association leaders, and other court leaders. 125 people completed the survey (a 45% response rate).

Questions asked on the survey included:

1. Identify the two biggest challenges or emerging issues facing Court/Justice Systems in the next 3-5 years;
2. Identify the two biggest challenges or emerging issues facing the Court Management Profession in the next 3-5 years;
3. List the 3 greatest strengths of NACM;
4. Provide top 2 suggestions for what NACM should do in the next few years to enhance effectiveness, relevance, and/or overall success; and
5. Additional comments/suggestions.

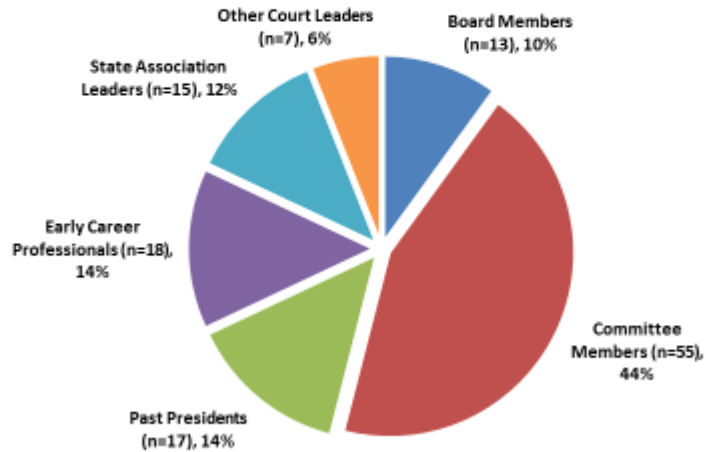
### **Characteristics of Respondents**

The characteristics of respondents are provided in the following charts – by survey group, by position, and by years in the Court Management Profession.



## Respondent Demographics – By Survey Groups

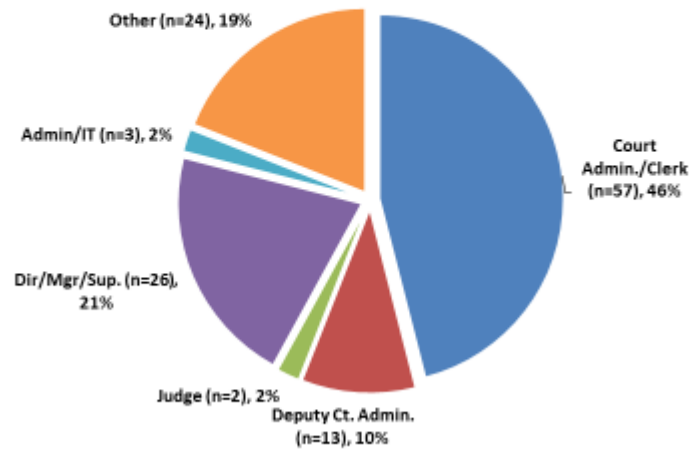
(in percentages; n=125)



Percentages may not equal 100% due to rounding.

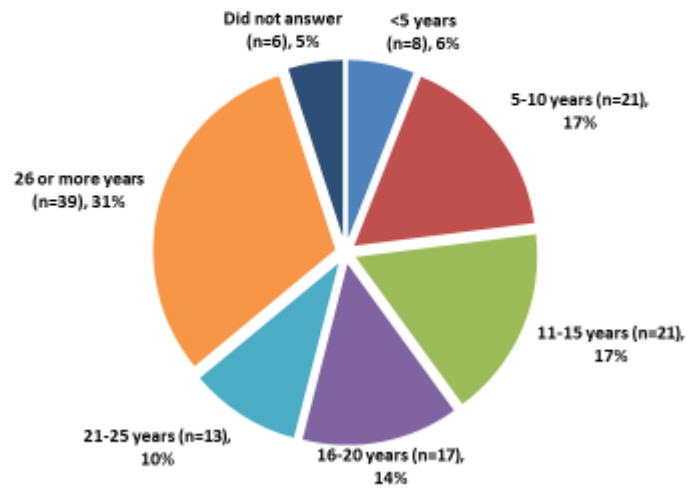
## Respondent Demographics – By Position

(in percentages; n=125)



Percentages may not equal 100% due to rounding.

## Respondent Demographics – By Years in Court Management Profession (in percentages; n=125)



Percentages may not equal 100% due to rounding.

## Summary of Results/Findings:

Q1: Biggest challenges/emerging issues facing Court/Justice Systems.

### Biggest Challenges/Emerging Issues facing Court/Justice Systems in the next 3-5 Years (rank order by most frequently mentioned)

Categories <sup>1</sup>	In Rank Order (n=279)	% of Responses
Keeping Pace with/Using Technology; Cyber Security	1	21%
Having Adequate Funding/Resources	2	18%
Improving Access/Meeting Changing and Increasing Service Needs	3	12%
Declining Public Perception/Declining Trust and Confidence in the Courts/Justice System	4 (tie)	9%
Keeping Abreast of and Responding to Trends and Changing Public Expectations	4 (tie)	9%

<sup>1</sup> Examples of comments in each of these categories are provided on the next slide.

Note: this was a multiple response question. Percentages are computed based on the number of responses, not respondents (n=279).

### "Biggest Challenges/Emerging Issues" facing Court/Justice Systems in the next 3-5 Years – Examples

	Examples of Comments
Keeping Pace with & Using Technology/Cyber Security	<ul style="list-style-type: none"><li>Affording and using existing and new technologies; need effective case mgt. systems; system integration; sharing data; keeping up with technological innovations; securing data/information.</li></ul>
Having Adequate Funding/Resources	<ul style="list-style-type: none"><li>Inadequate or stagnant funding; budget cuts; lack of resources; lack funding to meet growing and changing service needs.</li></ul>
Improving Access/Meeting Changing and Increasing Service Needs	<ul style="list-style-type: none"><li>Providing equal access to all; meeting needs of court users (e.g., self represented, elderly, non-English speaking, etc.); increasing online access/ability to do business remotely.</li></ul>
Declining Public Perception/Erosion of Trust and Confidence in the Courts	<ul style="list-style-type: none"><li>Declining image of the courts/justice system; the effect of high profile cases on courts nationally; disconnect between law enf. and courts; public lacks knowledge/doesn't understand the courts.</li></ul>
Keeping Abreast of/Responding to Trends & Changing Public Expectations	<ul style="list-style-type: none"><li>Difficult to stay abreast of and respond to trends (e.g., aging population, social media, technology); inability to keep pace with changing public expectations (e.g., online access, e-business, 24x7 services).</li></ul>
Miscellaneous/Other	<ul style="list-style-type: none"><li>Judicial Branch Independence; non-partisan judges; specialty Courts; providing needed treatment; implementing evidence-based practices; leadership/governance; demonstrating outcomes; communication/collaboration with external partners; criminal justice system reform; jail overcrowding; legislation.</li></ul>

Q2: Biggest challenges/emerging issues facing the Court Management Profession in the next 3-5 years.

### Biggest Challenges/Emerging Issues facing the Court Mgt. Profession in the next 3-5 Years (rank order by most frequently mentioned)

Categories <sup>1</sup>	In Rank Order (n=255)	% of Responses
Staffing/Workforce Issues	1	41%
Keeping Pace With/Using Technology and Cyber Security	2	13%
Having Adequate Funding/Resources	3 (tie)	11%
Diminishing Importance of/Threats to the Profession	3 (tie)	11%
Timely Resolution/Effective Caseload Management/Changing Caseloads	5	4%

<sup>1</sup> Examples of comments in each of these categories are provided on the next slide.

Note: this was a multiple response question. Percentages are computed based on the number of responses, not respondents (n=255).

### Biggest Challenges/Emerging Issues facing the Court Mgt. Profession – Examples

	Examples of Comments
Staffing/Workforce Issues	<ul style="list-style-type: none"> <li>Ensuring quality judges/staff; ability to recruit/retain skilled staff; inflexible/antiquated work policies; need for more training and dev.; need to manage a multi-generational workforce; developing next generation of leaders/succession planning in response to impending retirements; pay/compensation issues; change management; lack of mentoring.</li> </ul>
Keeping Pace With/Using Technology and Cyber Security	<ul style="list-style-type: none"> <li>Inability to implement existing/new technologies to support court functions/increase efficiency; how to improve virtual access; insufficient security.</li> </ul>
Having Adequate Funding/Resources	<ul style="list-style-type: none"> <li>Inadequate budgets; lack funding to provide/expand services to meet growing needs; insufficient funds to provide adequate infrastructure (technology, facilities, security); low staffing levels.</li> </ul>
Diminishing Importance of/Threats to the Profession	<ul style="list-style-type: none"> <li>Lack of knowledge of ct. admin. as a profession; lack of respect for the prof. role of court admin.; conflicting/overlapping roles/respon. between judges and court admin.; educating judges on role and value of prof. ct. administrators.</li> </ul>
Timely Resolution/Changing Caseloads	<ul style="list-style-type: none"> <li>Need to refocus on timely resolution/effective caseload mgt. practices; need to be able to respond to and manage changing caseloads</li> </ul>
Miscellaneous/Other	<ul style="list-style-type: none"> <li>Increasing access; meeting service needs; declining public perception/trust and confidence in the courts; leadership/governance; changing public expectations; responding to trends; judicial branch independence.</li> </ul>

### Q3: Greatest strengths of NACM.

#### Greatest Strengths of NACM (rank order by most frequently mentioned)

Categories <sup>1</sup>	In Rank Order (n=347)	% of Responses
Conferences/Education/Training/Professional Development	1	26%
Networking Opportunities	2	18%
Resources and Products	3 (tie)	12%
Forum for Information Exchange/Discussion	3 (tie)	12%
Board/Strong and Inclusive Leadership	5 (tie)	7%
A Voice/Advocate for the Profession	5 (tie)	7%

<sup>1</sup> Examples of comments in each of these categories are provided on the next slide.

Note: this was a multiple response question. Percentages are computed based on the number of responses, not respondents (n=347).

#### Greatest Strengths of NACM (rank order by most frequently mentioned)

	Examples of Comments
Conferences/Education/Training/Professional Dev.	<ul style="list-style-type: none"> <li>Great confs./education; valuable content; professional dev. on relevant topics; annual and mid-year confs.; excellent training.</li> </ul>
Networking Opportunities	<ul style="list-style-type: none"> <li>Great forum for collaborating/connecting with peers; networking with other professionals; great opportunities for networking.</li> </ul>
Resources and Products	<ul style="list-style-type: none"> <li>Core competencies; National Agenda; guides; information on best practices; information/resources on website.</li> </ul>
Forum for Information Exchange/Discussion	<ul style="list-style-type: none"> <li>Information sharing; forum to share/discuss best practices, trends, emerging issues, etc. with peers; forum to discuss national issues/discover better approaches to ct. administration.</li> </ul>
Board/Strong and Inclusive Leadership	<ul style="list-style-type: none"> <li>Active, committed, innovative, forward-thinking, inspirational Board; leadership; very inclusive; encourages new participation.</li> </ul>
A Voice/Advocate for the Profession	<ul style="list-style-type: none"> <li>NACM grows/sustains/promotes the profession; encourages professional development; promotes changes in the profession; speaks on behalf of trial courts; helps court professionals; represents court mgt. at national level; voice for the profession.</li> </ul>
Miscellaneous/Other	<ul style="list-style-type: none"> <li>Publications; quality reputation; a unifier; brings groups together; provides leadership opportunities; partners and reaches out to others; facilitates communication.</li> </ul>

Q4: Suggested changes/improvements to remain relevant, effective, and successful.

## Suggested Changes and Improvements

(rank order by most frequently mentioned)

Categories <sup>1</sup>	In Rank Order (n=233)	% of Responses
Provide New and Different Services/Options	1	16%
Use Technology/Website to Deliver Education/ Services	2 (tie)	15%
Increase/Retain/Target Membership	2 (tie)	15%
Engage/Involve/Communicate with Members	4	12%
More Products/Resources	5	10%

<sup>1</sup> Examples of comments in each of these categories are provided on the next slide.

Note: this was a multiple response question. Percentages are computed based on the number of responses, not respondents (n=233).

## Suggested Changes and Improvements

(rank order by most frequently mentioned)

	Examples of Comments
Provide New and Different Services/ Options	<ul style="list-style-type: none"> <li>More distance learning, virtual confs., online webinars; provide quality education in variety of formats; offer CEs for education; expand programming; shorter reg. conferences; provide targeted programming.</li> </ul>
Use Technology/Website to Deliver Educ./Services	<ul style="list-style-type: none"> <li>Online webinars; virtual conferences; more resources/information on website; produce videos; more fully use technology to add value.</li> </ul>
Increase/Retain/Target Membership	<ul style="list-style-type: none"> <li>Increase membership options (e.g., courts, states); develop targeted recruitment/engagement strategies; recruit new people to profession; target Federal Judiciary, rural/small courts, middle mgrs., court leaders, AOC leadership; create NACM ambassadors; maintain affordable dues.</li> </ul>
Engage/Involve/Communicate with Members	<ul style="list-style-type: none"> <li>Increase engagement through webinars; solicit input from members; collaborate/communicate with members; seek new ways to hear from members; more outreach; use social media.</li> </ul>
More Products/Resources	<ul style="list-style-type: none"> <li>Provide more info/resources on best practices; produce more Guides/resources on important/emerging topics (e.g., employee handbooks, COOPs, trends, white papers, research, blogs); provide more information relevant to state courts.</li> </ul>
Miscellaneous/Other	<ul style="list-style-type: none"> <li>Demonstrate value of profession and role of professional administrator; improve judge/administrator relations; continue/ improve confs./educ. programs; recruit &amp; train Board members; dev. strong leaders; lead the prof. build partnerships; increase networking; provide discussion forums.</li> </ul>

## **Summary of Strengths, Weaknesses, Opportunities, and Threats**

In addition to the survey findings, Board members added the following strengths and weaknesses/areas for improvement, opportunities, and threats pursuant to a discussion at the November 2015 strategic planning session.

<b>Strengths</b>	<b>Weaknesses/Areas for Improvement</b>
<ol style="list-style-type: none"> <li>1. Board of Directors is dedicated and open to new ideas; Board is more diverse and representative</li> <li>2. Structure is well-defined structure – Board member seats, committees</li> <li>3. Secretariat services of/access to NCSC</li> <li>4. Board is fiscally prudent/responsible; has reserves</li> <li>5. Increasing use of technology – live streaming, webinars, etc.</li> <li>6. Resources/publications are available electronically</li> <li>7. Social media presence/engagement</li> <li>8. Educational programs</li> <li>9. Publications, Guides, and other resources – Court Manager, Core Curriculum, National Agenda, etc.</li> <li>10. Mentor program</li> <li>11. Networking/involvement through conferences</li> <li>12. Opportunities to be involved in Committees</li> <li>13. Programming for/engagement of early career professionals</li> <li>14. Forms partnerships and is a unifier/collaborator in the profession</li> <li>15. Taking more of a leadership position on important issues</li> <li>16. Input is solicited and valued</li> </ol>	<ol style="list-style-type: none"> <li>1. Difficult recruiting Board Members</li> <li>2. Division of workload among, and meaningful work on, Committees</li> <li>3. Overlapping/out of date committee charges</li> <li>4. Lack of available and useful data/information – financials, member statistics, etc.</li> <li>5. Dependent on grants</li> <li>6. Increasing costs</li> <li>7. Need to attract new, retain existing, and engage more members</li> <li>8. Need to define, enhance, and communicate the range of services/value of membership</li> <li>9. Difficult to stay up with/ahead of technology – apps</li> <li>10. Website is out of date; need more resources on website</li> <li>11. Need to strengthen social media presence/activities</li> <li>12. Need to enhance mentor program</li> <li>13. Advocacy role needs more definition/direction</li> <li>14. NACM is overly cautious on taking positions on important issues</li> <li>15. Need to expand partnerships (with non-traditional partners such as private sector)</li> </ol>

<b>Opportunities</b>	<b>Threats</b>
<ol style="list-style-type: none"> <li>1. Increase membership</li> <li>2. Reach untapped markets/conduct targeted marketing (younger professionals, specific states/regions)</li> <li>3. Increase membership engagement – tap new potential, expand role of different groups (ECP, Past Presidents, etc.)</li> <li>4. Strengthen/reinvent NACM – structure, image, brand, reputation</li> <li>5. Expand/enhance products/resources</li> <li>6. Greater use of technology</li> <li>7. Increase collaboration/expand partnerships</li> <li>8. Educate court leaders/others</li> </ol>	<ol style="list-style-type: none"> <li>1. Changing demographics/needs of court workforce</li> <li>2. Aging membership/inability to recruit and retain new and/or younger members</li> <li>3. Lack of meaningful engagement of members</li> <li>4. Budget constraints/lack of funding/increased competition for limited resources</li> <li>5. Inability to communicate/demonstrate return on investment</li> <li>6. Slow or unwillingness to change/being stuck in tradition</li> <li>7. Burnout of NACM Leadership</li> <li>8. De-valuing the court management profession</li> <li>9. Diminishing understanding of 3 branches of government</li> <li>10. Declining trust and confidence in courts</li> <li>11. Emergence of competing organizations/partners</li> </ol>

## **MASTER SERVICES AGREEMENT**

THIS AGREEMENT is made between the National Center for State Courts (hereinafter referred to as the Center) and the National Association for Court Management (NACM) (hereinafter referred to as the Association), effective on the \_\_\_\_ day of \_\_\_\_, 20-- to establish the scope of management and secretariat services to be provided by the Center to the Association and the terms and conditions of such services.

The parties agree as follows:

1. Term. The work under this Agreement shall commence on January 1, 2018, and shall be completed on or before December 31, 2020, unless the time for completion is extended by mutual agreement in writing by the Association and the Center. This Agreement will renew automatically for an additional 60 days unless superseded by a new agreement or notice of cancellation is provided prior to the expiration of the term.
2. Scope of Services. The Center shall perform the services set forth in Appendix A, Scope of Association Services, and Appendix B, Scope of Education Services, which is incorporated by reference herein.
3. Base Fees. The services rendered by Center under this Agreement will be performed for a fixed price of:  
  
2018: \$443,510 less \$90,000 NCSC Contribution = \$353,510  
  
2019: \$452,380 less \$90,000 NCSC Contribution = \$362,380  
  
2020: \$461,428 less \$90,000 NCSC Contribution = \$371,428
4. Payment. Payment will be made directly to the Center upon submission of invoices and statements for services rendered. This fee is based solely upon the functions identified in the Scope of Services. Invoices shall be submitted monthly with the fee and any additional charges due and payable within thirty days of the invoice date.
5. Additional Charges. Additional services beyond those listed in the Scope of Services will be billed at an agreed upon hourly rate per project. Work for additional charges must be pre-approved by the President of the Association.
6. Out of Pocket Costs. The following items will be billed to the Association for "out-of-pocket" expenses at their actual cost:
  - Copies
  - Faxes
  - Broadcast email subscription services
  - Mailings
  - Business Cards
  - Outsourcing of special Association approved services and projects
  - Travel expenses for designated support staff
  - Other out-of-pocket expenses that are approved through the Association's budget



7. Independent Contractor Status. The Center is an independent contractor and not an employee, servant, agent, partner or joint venturer of the Association. The Association shall determine the scope of services to be performed and shall monitor the work progress and quality, but the Center shall determine how, when and the means by which it accomplishes the work specified by the Association. The Center shall set its own daily hours of work consistent with the requirements of the scope of services, and shall furnish its own place of work as well as supplies and equipment. Any and all employees of the Center while engaged in the performance of any work or service required by the Association under this Agreement will be considered employees of Center only and not of the Association. Any and all claims that may arise under the Worker's Compensation Act of Virginia on behalf of Center's employees while doing any work under or associated with this Agreement shall be the sole obligation and responsibility of Center.
8. Ownership of Information and Property. All computer data and paper records prepared by the Center specifically for the Association or prepared or provided by the Association, its officers, directors, members, or agents, along with supplies purchased by the Association are the property of the Association. Other data and records, including those regarding the operations of the Center, along with all other supplies and property, shall remain the property of the Center. Upon termination of this Agreement, all Association property will be returned to the Association and all outstanding Center invoices will be paid by the Association. Computer data will be placed on suitable media in an ASCII file. Data fields will be documented on paper and a hard copy will be provided of all data. The Center will retain the Association's records in accordance with the Association's approved records retention policy. The Center may retain a copy of the Association's data and records for archival purposes. Any additional expenses incurred during the transfer process from the Center will be billed at actual cost. Under this agreement, the Association authorizes the use of its membership and other prospect databases to be used by the NCSC to market its programs and services. In exchange, NCSC will allow the Association to use its customer and prospect database for appropriate marketing of its programs, services and membership.
10. Representation. The Center is hereby authorized, subject to the approved the Association's budget and annual plan, to acquire on the Association's behalf and for its benefit, goods and services. Any resulting agreements and/or contracts are the responsibility of the Association.
11. Indemnification: The Association shall indemnify and hold harmless the Center, its officers, directors, employees and agents for and against all liabilities of any nature or kind related to any and all claims and causes of action by third parties, including but not limited to judgments, verdicts, settlements, fines, court costs, and reasonable attorneys' fees, resulting from any act or omission of the Association, its officers, directors, members, or agents, or any act or omission of the Center, its officers, directors, employees, or agents acting within the scope of their authority on behalf of the Association .  
  
The Center shall indemnify and hold harmless the Association its officers, directors, members and agents for and against all liabilities of any nature or kind related to any and all claims and causes of action by third parties, including but not limited to judgments, verdicts, settlements, fines, court costs, and reasonable attorneys' fees, resulting from any act or omission of the Center, its officers, directors, employees, or agents, that are outside the scope of their authority to act on behalf of the Association.
12. Confidentiality. The Center agrees that with respect to any and all materials, reports, correspondence, or other documents which have been stamped or otherwise identified as confidential matters by the Association's President, Officers, or Board ("the Confidential Materials"), the Center shall not disclose, distribute or publish such Confidential Materials to any third party, unless otherwise requested by a duly authorized member of the Association's Executive Committee.
13. Governing Law. The laws of the Commonwealth of Virginia shall govern the validity, construction, interpretation, and effect of this Agreement.

14. Entire Agreement and Modification. This Agreement constitutes the final, integrated expression of the Agreement of the Association and the Center and supersedes all previous communications, representations, or agreements, either verbal or written that may have been made in connection with the subject matter hereof. No amendments or changes may be made to the terms and conditions of this Agreement (including, but not limited to scope of services, deliverables, timetable or terms of Agreement, price, cost or budgetary adjustments), without the mutual, written consent of the parties.
15. Waivers. The failure of the parties to enforce, at any time, the provisions of this Agreement or to exercise any option that may be provided will not be construed as a waiver of such provisions or to affect the validity of this Agreement or any part thereof or the right of the parties to enforce thereafter each and every provision and to exercise any such option. No waiver of any breach of this Agreement shall be held to be a waiver of any other or subsequent breach. All remedies available under this Agreement shall be taken and construed as cumulative, that is, as being in addition to every other remedy provided by operation of law.
16. Termination for Cause. If either party fails to fulfill its obligations under this Agreement in a timely and proper manner or otherwise violates any provisions of the Agreement, the other party will have the right to terminate this Agreement for cause by giving written notice. The notice shall specify the acts or omissions relied upon as cause for termination. The termination will become effective sixty (60) days following receipt, provided that the recipient of the notice will have thirty (30) days following receipt of notice to remedy the claimed deficiencies. All finished or unfinished work provided by the Center shall become the property of the Association. The Center is entitled to receive just and equitable compensation for any satisfactory work completed prior to the effective date of termination.
17. Periodic Evaluation. The President of the Association will meet with the Center's President, Vice President for External Affairs, or Director of Association & Conference Service at regularly scheduled meetings of the Association's officers, board, and other available meetings to discuss the progress or the performance of this contract. The Association and the Center agree to voice concerns, point out deficiencies, request changes, and other contract related communications during these meetings.

Representing NCSC:

Representing NACM:

Print Name:

Mary McQueen

Print Name:

Vicky Carlson

Signature:

\_\_\_\_\_

Signature:

\_\_\_\_\_

Title:

President

Title:

President

Date:

\_\_\_\_\_

Date:

\_\_\_\_\_

## **Attachment A**

### **SCOPE OF ASSOCIATION SERVICES**

The following services will be provided by the Center to the Association:

#### **I. General Management**

- Provide office, to serve as headquarters, open Monday through Friday, 8:30 am - 5:00 pm EST, except during NCSC designated holidays
- Respond to requests for information about the organization and specific information related to projects, conferences and meetings
- Maintain files for the association per the Association's Destruction of Records Policy
- Handle correspondence, monitor and respond to NACM email folders on a daily basis
- Act as liaison between NACM, NCSC divisions and other organizations
- Monitor hotel, conference-related, and insurance contracts/agreements
- Monitor NACM operating budget
- Maintain contact with the officers and members of the board
- Obtain and monitor directors & officers liability insurance
- Maintain NACM's subsidiary ledger (ACGI) for membership dues, conference registration, product sales, and remittance of payments and daily supporting cash receipt entry form for deposit
- Maintain, ship and prepare materials for the NACM booth as requested
- Manage inventory of NACM merchandise
- Track trademarks (NACM and Core) renewal

#### **II. Membership**

- Maintain official membership files and records of the association per the Association's Destruction of Records Policy
- Respond to inquiries and requests for information from prospective members
- Distribute information and materials to members as directed by officers and directors
- Coordinate development and distribution of promotional materials
- Prepare monthly reports on the status of membership including purged, dropped, new & reinstated, membership report, members with no e-mails and updated active membership list
- Prepare ad hoc membership reports (please allow 48 hours processing time)
- Send first, second and third notices for renewal of dues. The first and second notices will be electronic, the third notice will be mailed.
- Post updated membership directory to the website
- Take credit card payments over the phone
- Answer email requests for login/password for self-service
- Answer requests for help regarding membership categories
- Answer inquiries regarding transfer of memberships
- Verify membership eligibility for students and e-limited members

- Respond to member requests for missed publications
- Create and maintain membership map
- Track and report on dual member partnerships annually

### **III. Conference (Annual and Midyear Conferences and Fall Board Meeting)**

- Respond to inquiries and requests for information
- Manage the RFP process for in-person NACM meetings (Midyear and Annual) in partnership with the Secretary-Treasurer. Use approved NCSC housing contractor (service provided on a commission basis at no additional charge to NCSC or NACM). This includes managing site selection, conducting site visits with the Secretary-Treasurer (NACM pays travel costs), and contracting with all 3<sup>rd</sup> parties
- Review specifications annually with conference manager for any changes or additions to program(s)
- Promote call for proposals (2 per conference) via blast emails and social media.
- Coordinate with other NCSC managed Associations to promote Conferences and call for papers
- Work with President elect to assign meeting rooms and logistics with hotel
- Present conference budget to President-Elect for review and approval
- Prepare, distribute audio visual RFP.
- Determine menus for conference meals and meetings and present to appropriate party for approval.
- Make lodging accommodations for board and speakers
- Maintain weekly hotel pick up and registration numbers (pace report). Distribute to NACM Officers as directed
- Coordinate AV requirements for conferences and fall board meeting
- Prepare and distribute Schedule of Events Guide
- Prepare and reconcile conference budget, including reconciliation of hotel bills
- Prepare and mail education credit certificates, if needed, following each conference
- Assemble conference materials in coordination with committee chairs, exhibitors and speakers and post on NACM website and on the conference app, as may be needed
- Coordinate pre and onsite registration process
- Coordinate and manage all logistics for ancillary meetings for Annual and Midyear conferences.
- Coordinate Annual Conference Scholarship process.
- Secure event insurance
- Prepare Schedule at a Glance
- Assist with planning and coordination of social events, including identifying sites, registration and revenue management, coordinate transportation needs and provide on-site staffing when requested
- Coordinate Board Nominations prior to and during Annual Conference
- Coordinate awards process for Perkins, McQueen, Early Career Professional, Justice Achievement Award, and Top 10 Technology Solutions Awards
- Purchase and ship conference awards to conference site and to recipients not attending conference

- Contract and manage logistics for Fall board meeting
- Prepare and distribute Post Conference Report within 60 days of close of conference
- Maintain and post conference cancellation policy
- Reconciliation of conference registration fees and cancellations

#### **Marketing for Conferences:**

- Create conference marketing timeline
- Create, build and maintain conference app
- Create, build and maintain conference registration site
- Develop and send six attendee emails for the annual conference and four attendee emails for the midyear conference.
- Target marketing to local associations for conferences (use of state association list, Dual Members, Google, etc.)
- Prepare PDF registration form
- Post conference marketing information on NACM's social media
- Develop, distribute and report results of the attendee conference survey
- Prepare ads for Court Manager and Court Express
- Support Host recruitment through maintenance of Host module on line (includes entering all sessions, alerts, reports, etc.)

#### **Conference Exhibitors**

- Determine sponsorship offered and obtain president approval
- Manage exhibitor and sponsor relationships
- Coordinate exhibition shows with organization's leadership, vendors
- Manage booth and sponsorship sales
- Manage contracts with exhibitors and sponsors and ensure obligations are met
- Manage RFP process for show service provider (e.g., Freeman, Shepard, other) for both shows. Recommend vendor to NACM President-Elect and secure appropriate contract
- Work with show service provider to coordinate exhibitor orders and on-site signage and exhibit hall set-up for shows
- Review show service provider invoice for accuracy; assist in reconciling, if necessary
- Manage revenue and balances due
- Contact current and past exhibitors and sponsors for renewal as well as reach out to potential new companies (using CTC and E-Courts exhibitor lists as a basis) to encourage participation with NACM
- Keep President-Elect up-to-date with booth/sponsorship sales and revenue projections
- Work with service providers to secure floorplans for following year's midyear and annual conference
- Prepare and distribute exhibitor surveys
- Contribute ideas for incentives to increase exhibit show attendance

#### **IV. Board/Executive Committee**

- Staff Officer and Board meetings (two at Annual Conference, one in-person Fall Board Meeting, one Midyear Board Meeting, as well as Officer retreats prior to Annual and Midyear Board meetings). Includes all scheduled phone meetings.
- VP of External Affairs or Director of Association Services participate in scheduled Officer and Board meetings
- Prepare minutes for Secretary/Treasurer; archive digital recordings of all meetings
- Assist President with development of agendas for Officer and Board meetings and conference calls as needed.
- Prepare draft annual NACM budget in conjunction with Secretary and Vice President
- Coordinate and participate in annual meeting with Secretary/Treasurer and Vice-President at NCSC offices to draft budget (NCSC covers expenses of Secretary/Treasurer)
- Prepare and distribute requested monthly financial reports to Secretary/Treasurer
- Send reminder e-mails for Officer and Board calls as may be requested by President
- Prepare, coordinate and disseminate electronic board books for each board meeting
- Issue invitations to Board guests for meetings and track RSVPs
- Respond to inquiries within 48 hours

## **V. Committees**

- Provide professional support to chairs of NACM committees:
  - Nominations
  - Governance
  - Conference Development
  - Membership Services
  - Communications
  - Core
- Update Committee webpages as needed
- Schedule and participate in committee conference calls, as may be needed
- Disseminate and collect committee service and mentor/mentee forms at conferences and from new members; disseminate completed forms to committee chairs
- Coordinate committee award nomination and selection processes (enumerate applicable awards)

## **VII. Communications**

### **1. Membership Brochure**

- Proofread, edit and contract with graphic artist when requested
- Coordinate distribution, and post to website

### **2. Guides (up to a maximum of 4 in the contract period)**

- Edit guide copy
- Coordinate with graphic artist on layout, design, cover selection and photographs used.

- Distribute proof copy to Guide chair for review
- Work with Guide and Communications committee chair for coordination of schedule and production
- Coordinate printing, posting, and distribution to membership and others
- Coordinate inventory on hand and sale of publications including filling orders, sending invoices, recording payments

### **3. Stationary**

- Contract with graphic artist
- Update and maintain electronic Board letterhead and post on Board webpage
- Maintain inventory of NACM notecards and envelopes and distribute at post annual conference board meeting.

### **4. Court Manager (4 annually)**

- Create and publish schedules, provide email reminders to editors of impending deadlines
- Contract and coordinate photography services
- Contract with graphic artist
- Advise editors on content selection
- Work with authors
- Solicit author permissions
- Manage permissions for article usage requests
- Post copies online to Members Only page of NACM website
- Edit and proofread
- Establish print numbers
- Create ads as needed
- Create separate PDFs of each edition for use on other web pages, as appropriate and authorized by the NACM Board
- Work with printer (solicit bids, see product through to completion)
- Solicit advertising, (bill, maintain records, monitor budgets)
- Distribute author, editor and advertiser complimentary copies
- Establish and monitor yearly budget in conjunction with Secretary-Treasurer
- Coordinate distribution of each edition to membership (exclude eMember membership category)
- Coordinate separate first class mailing for international addresses

### **5. Court Express (6 annually)**

- Advise editors on content selection
- Create and circulate production schedule
- Proof submitted copy
- Layout newsletter in iContact (or other e-format)
- Coordinate e-mail distribution to members
- Provide email reminders to editors of impending deadlines
- Post in the Court Express archive on the NACM website

## **VIII. Website Social Media, Blast Emails**

- Add new content and edits as requested and/or provided by NACM within 48 hours
  - Post general information and items of interest to NACM's social media platforms
  - Post conference photographs
  - Create, layout, proof and distribute blast emails using iContact or a similar system, subject to the following guidelines:
    - Blast emails enumerated elsewhere in this agreement are incorporated by reference
    - Eight additional blast emails per calendar year to support webinars are included
    - Twelve additional blast emails per calendar year to support other communications objectives are included
    - Work to support any blast emails beyond those enumerated above will be billed at the rate of \$125/hour.
    - NCSC will update the iContact system (or its successor) with current email distribution lists once per month
    - The NACM President may authorize NACM Board members to send additional emails on their own, without the support of NCSC staff, using the lists uploaded monthly or by creating their own lists
    - NCSC shall offer one-hour of training per contract year on the basics of iContact (or its successor) to one designee of the NACM President

## **IX. Financial Services**

### **1. Accounting:**

- Maintain NACM as a separate corporation on NCSC accounting software system (including monthly close, annual close, budgetary entries, and vendor setup)
- Maintain and verify balances of all balance sheet, income & expense accounts on NACM's general ledger
- Reconcile NACM bank accounts on a monthly basis and record interest and fees in general ledger
- Prepare journal entries, as necessary, to reflect expenses and income in proper accounts
- Prepare financial statements on a monthly basis
- Prepare budget in conjunction with NACM Officers
- Maintain budget spreadsheets
- Prepare required materials and participate in audits performed by independent accounting firm or NACM representatives
- Maintain and reconcile NACM credit card and statements
- Prepare payable and deposit vouchers
- Send financial reports to officers monthly as specified by Financial Reporting Policy



## **2. Reporting and Taxes:**

- Prepare and provide required information to independent public accountant for IRS Information Return--Form 990 and IRS Tax return – Form 990T
- Prepare and get signatures on State Corporation annual report
- Prepare and distribute IRS Form 1099s for NACM vendors, as required

## **3. Bookkeeping:**

- Review/proof disbursement requests and cash receipts for accurate posting to NACM General Ledger
- Prepare and mail accounts payable checks on a weekly basis
- Prepare and deposit NACM receipts weekly and enter, review and approve and post cash receipts to NACM General Ledger
- Maintain vendor files and IRS Form W-9s for all NACM vendors
- Provide NACM W-9s as requested
- Bill NACM “out of pocket” expenses incurred by NCSC on NACM’s behalf, on a monthly basis. (i.e. postage, copies, conference calls, and any other out-of-pocket expenses that are approved through the NACM budget)
- Prepare bank signature cards and get signatures, as signatories change, with existing bank

## **4. SJI Grants**

- Monitor SJI funds and request disbursement of funds from SJI quarterly or as needed
- Support grant writing process by providing specific information as requested; provide budget review assistance as requested
- Ensure grant financial compliance; including preparation of quarterly financial status reports as required by the funding agency
- Prepare progress reports
- Assist with responding to financial reviews by the funding agency
- Track and manage grant balances. Coordinate with committees about remaining balances.

## **5. Credit Card Processing**

- Reconcile credit card payments
- Ensure deposits are made to NACM bank account

## **Attachment B**

### **SCOPE OF EDUCATIONAL SERVICES**

The following educational services will be provided by the Center to the Association:

The Center will provide educational services in support of the Association's Midyear and Annual conferences scheduled for 2018, 2019, and 2020 as well as preliminary planning for the two 2021 education programs. The following services will be specifically provided:

Administrative support, such as:

- Responding to all inquiries and requests for information relating to Call for Proposals for Midyear and Annual conferences: acknowledge receipt of all proposals; coordinate and maintain records of ranked proposals; notify unsuccessful proposers
- Coordination of speaker contracts, biographical summaries, presentations, and conference materials; work with Association Services to make all speaker information available on the conference website or app (as determined by NACM)
- Drafting and updating conference agendas
- Preparing/proofing, and emailing faculty, presenters, and panelist agreements detailing the terms and conditions of engagement, presentation times, reimbursement guidelines, travel policy, materials deadlines, formats, etc.
- Preparing CEU forms and process all requests for credits
- Coordinating with the Center's accounting department and all faculty the necessary forms for compensation of fees: process all vouchers for speaker fees and/or expense reimbursements
- Preparing faculty travel list and coordinate same with designated travel agency
- Preparing evaluation forms, coordinate daily electronic transmission and follow-up notices to conference attendees, compile evaluation results
- Drafting and sending thank you letters to all speakers
- Preparing officer conference speaking agenda and announcements

Professional support, such as:

- Consulting with the President Elect & Conference Development Committee to recommend topics, sessions, and speakers for conferences
- Contacting prospective speakers and negotiating speaker agreements according to NACM guidelines and budgeted allowable expenses
- Preparing agendas for review and approval
- Reviewing evaluations and integrating with future planning
- Working with President elect to determine which sessions to record
- Providing reporting for grants that directly support the midyear and annual conference education programs
- Attending Board and Officer meetings (in person or by conference call)