



**2016 – 2019**  
**STRATEGIC PLAN AND ANNUAL PRIORITIES**  
National Association for Court Management

June 2016



*Strengthening Court Professionals*

## Table of Contents

Letter from NACM Leadership

Acknowledgements

Section 1: Overview .....	1
Section 2: Mission, Vision, and Core Values .....	2
Section 3: Strategic Focus Areas (SFAs), Goals, and Strategies .....	3
SFA 1: Membership – Recruitment, Retention, and Engagement.....	4
SFA 2: Education and Resources Provided by NACM .....	5
SFA 3: Advocacy for the Profession .....	6
SFA 4: Association Governance.....	6
Section 4: Annual Strategic Projects .....	8
Section 5: Implementation Approach.....	10
Appendices:	
A: External and Internal Trends Analysis – Charts, Graphs, and Implications.....	12
B: Organizational Assessment and Summary of 2015 Strategic Planning Survey .....	24

## 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

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### 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

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- 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

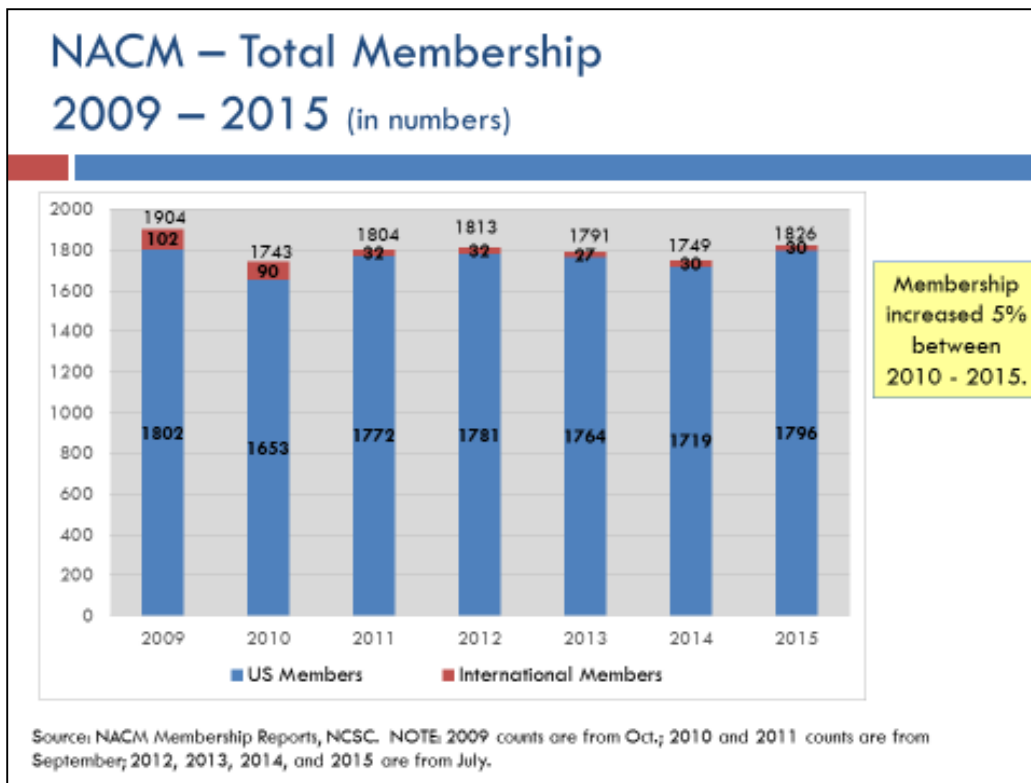
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future. Changes and advances are occurring at breakneck speed. NACM must develop and better use technology (e.g., webinars, live streaming, the website, electronic communication, social media, etc.) to enhance services and engage members. NACM's products 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.

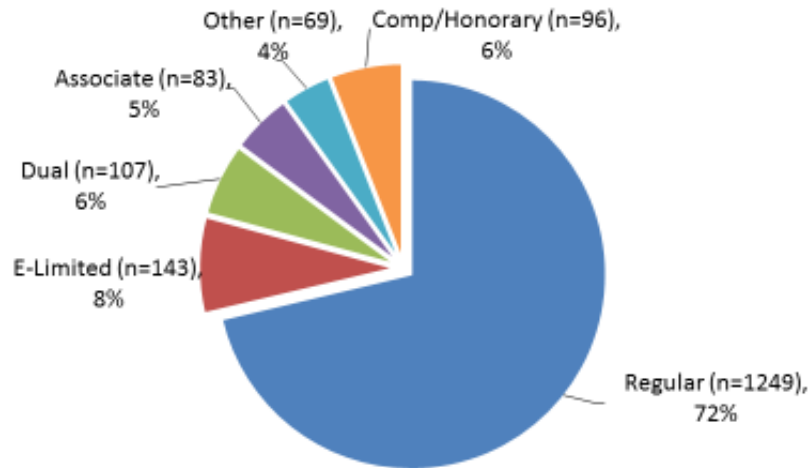
5. NACM must continue to grow and retain membership. As a professional association serving members and the court management profession, NACM's lifeline is in growing and retaining its members. It will need to critically assess and explore ways to increase and retain members. Specifically, NACM will need 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.

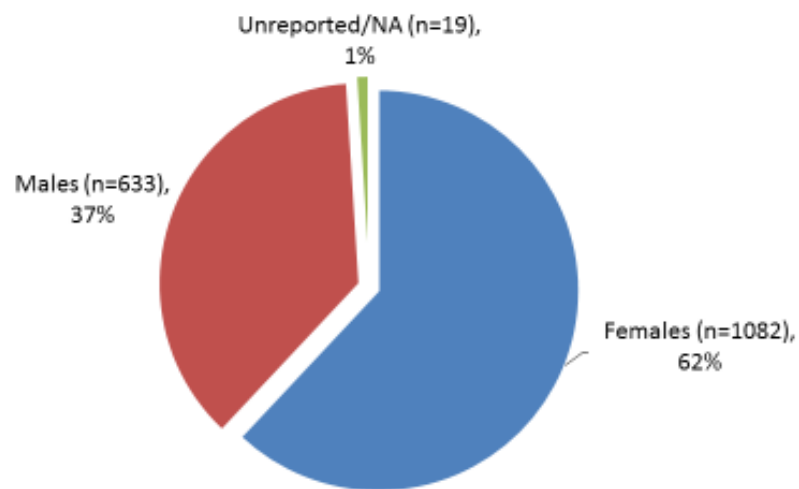


## NACM Membership – By Type of Membership July 2015 (in percentages; n=1747)



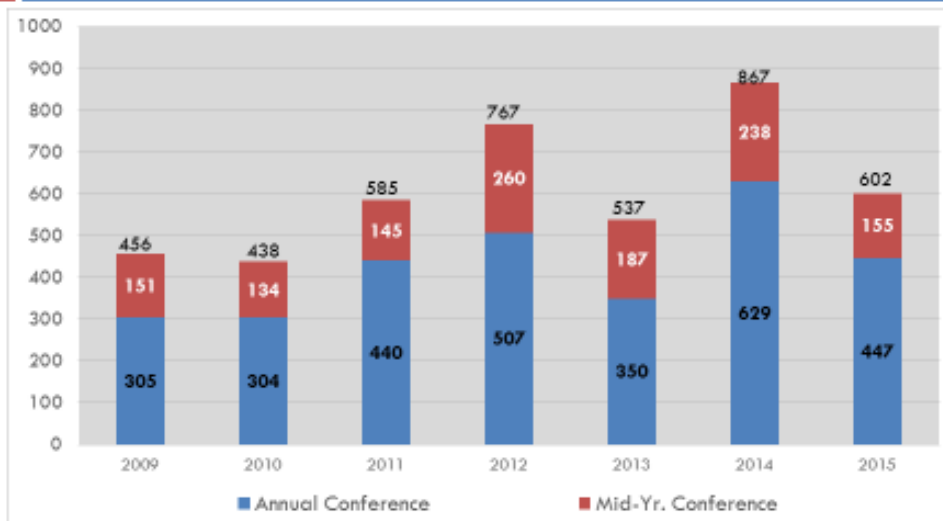
Source: NACM Membership Reports, NCSC. Percentages may not equal 100% due to rounding.

## NACM Membership – By Gender October 2015 (in percentages; n=1734)



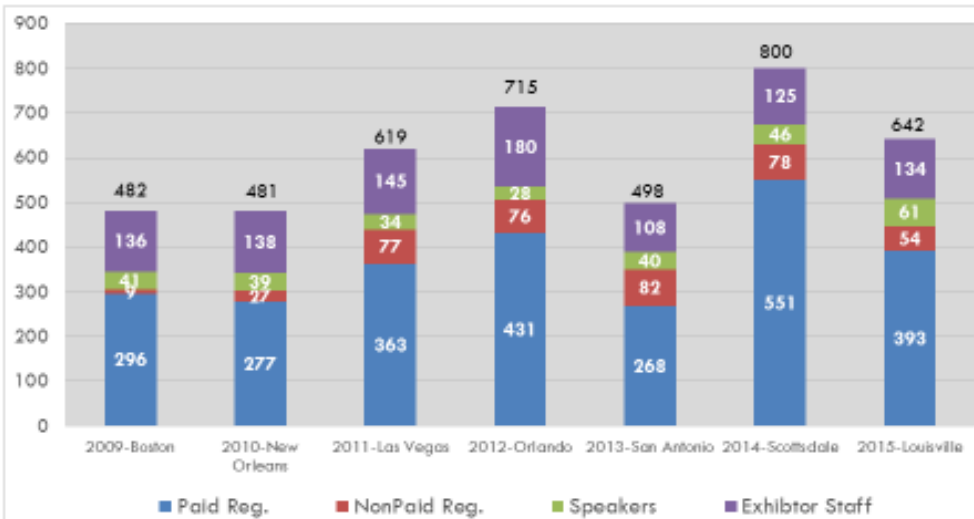
Source: NACM Membership Reports, NCSC. Percentages may not equal 100% due to rounding.

## NACM – Total Conference Attendance - Annual and Mid-Year Conferences Combined - 2009 – 2015<sup>1</sup> (in numbers)



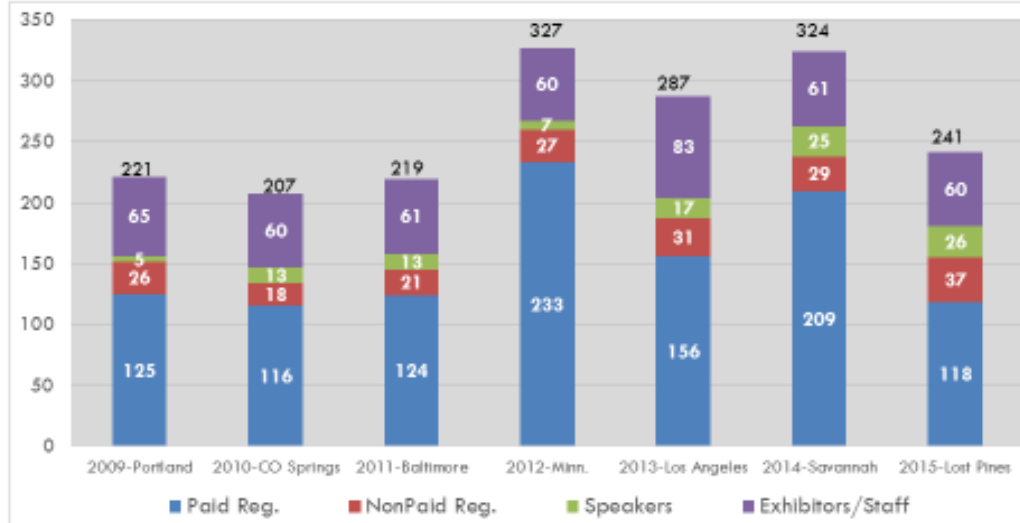
<sup>1</sup> Includes only paid and non-paid registrations. Speakers and exhibitor staff are excluded from the counts.  
Source: NACM Membership Reports, NCSC.

## 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**

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:

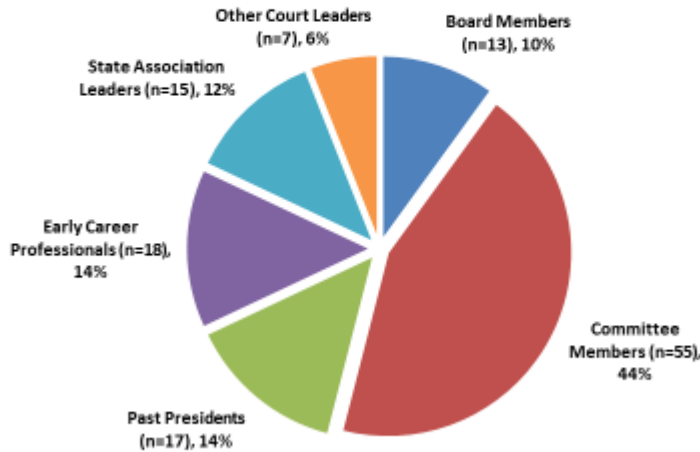
1. Identify the two biggest challenges or emerging issues facing Court/Justice Systems in the next 3-5 years;
2. Identify the two biggest challenges or emerging issues facing the Court Management Profession in the next 3-5 years;
3. List the 3 greatest strengths of NACM;
4. Provide top 2 suggestions 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

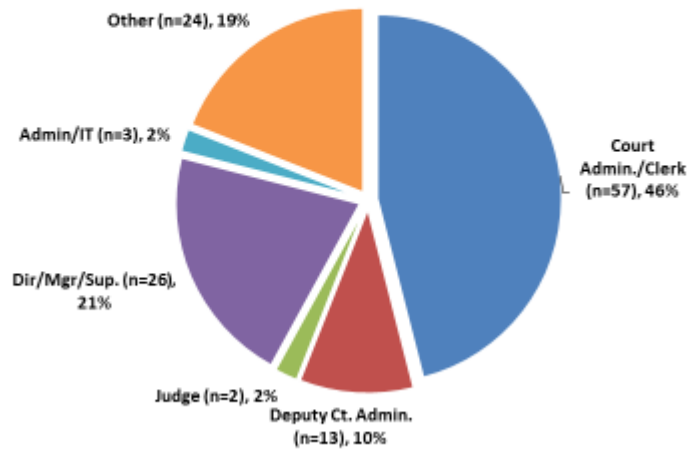
(in percentages; n=125)



Percentages may not equal 100% due to rounding.

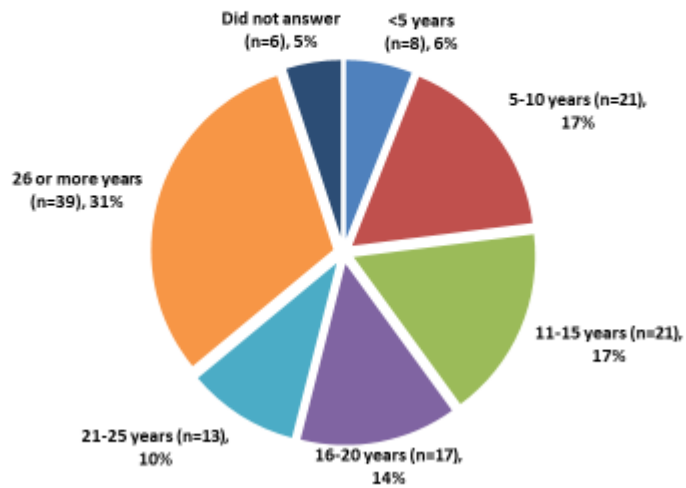
## Respondent Demographics – By Position

(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.

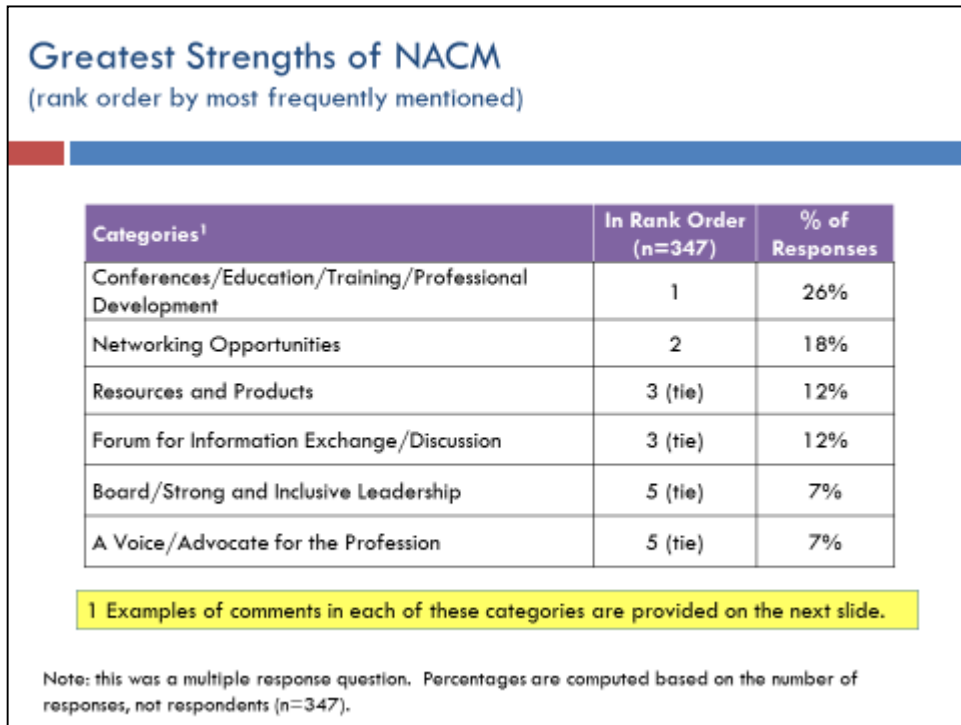
Note: this was a multiple response question. Percentages are computed based on the number of responses, not respondents (n=255).

### 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)

	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.

Strengths	Weaknesses/Areas for Improvement
<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>

Opportunities	Threats
<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>