



# **2022 Strategic Planning Report**



**National Court Reporters Foundation**

**2022**  
**Strategic Planning Report**  
  
**for the**  
  
**National Court**  
**Reporters Foundation**

**October 2022**

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# **2022 STRATEGIC PLANNING REPORT**

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# Background and Methodology

This report represents the review, discussion, and compilation of strategic goals and objectives for the new 2022 Strategic Plan (SP) for the National Court Reporters Foundation (NCRF) conducted in July 2022 by Dave Wenhold, CAE, PLC, and Cindy Isaacsen, RPR, at the annual NCRA Conference & Expo.

The SP resulted from the NCRF Board of Trustees' review of short-term goals and objectives as well as identifying activities that remain relevant for the upcoming 1–2 years. Action items included as part of the new SP are recommendations from the collaborative NCRF Board of Trustees working session in July.

The 2022 SP is meant to be a living and dynamic document that serves as a guide for the organization and volunteer leaders as they move into a post-pandemic world and provide targeted action for the Board of Trustees of the NCRF. The plan's actionable items better position NCRF to continue to provide superior value through enhanced member communications, education, outreach, and organizational efficiencies.

In support of commonly accepted practices in the nonprofit community, we firmly believe that strategic planning is most effective with a focus on the long-term mission and vision of the organization while delivering tangible deliverables in the short-term (1-2 years). Creating longer-term strategies and tactics may be untenable due to unforeseeable changes. The quick onset of how COVID affected associations in 2020 is a clear example of the need for organizations to be nimble. We encourage NCRF to continually conduct an environmental scan to “keep their finger on the pulse” of the profession, member needs, and the industry at-large – to ensure that the SP priorities remain relevant.

Fortunately, NCRF is led by a functional, passionate, and dedicated volunteer Board of Trustees. The action items identified by the NCRF Board will allow the Foundation to transcend to the next level of its organizational growth. We have been excited to see that the Board was willing to challenge the status quo and continually look for new ways to add valuable components that increase NCRA/NCRF member value.

One final comment: Strategic plans are only as good as the organization's commitment to follow through on the agreed upon priorities and actionable items. Individual board/committee member's accountability to their areas of responsibility within the SP will also dictate the success or failure of the plan. In short, the plan is only as strong as the individual's commitment to its success.

# 2022 Strategic Plan Overview

The facilitators of the working group's session believe in providing strategic planning facilitation that results in actionable items that are clear, concise, and tangible.

We also recognize that volunteer leaders have complex, full-time careers, which can limit participation and attendance at Board activities. With the information gathered during interactive strategic planning exercises, we were able to identify priorities that align with the mission of the organization and create the following strategic areas that the Board has decided to pursue. These are the three areas of concentration that the Board voted on to create the focus of this plan around.

The Board engaged in an exploratory exercise to identify top priorities for the Association. Each Board member was then asked to vote on their top three priorities. As a result, three strategic goals emerged which are listed below in order:

## Identification of issues for focus of the plan:

1. **Create a Cradle to Retirement Strategy for Member Engagement**
2. **Public Relations for Foundation**
3. **Work with NCRA on Getting More Students into the Profession**

The NCRF Board then began fleshing out the three strategic goals, to include specific tasks, which need to take place to achieve the Board-approved goals.

This is an example of the tasks and how they can be accomplished.

<i>Strategic Goal:</i>	What needs to be accomplished
<i>Action Steps:</i>	Specific tasks needed to complete the goal
<i>Prioritization:</i>	High, Medium, Low
<i>Responsibility:</i>	Board or committee member responsible for Action Steps

This SP is designed to be implemented and completed no later than March 2024 with many components slated for completion within the next 8-18 months. After that time, we suggest that the NCRF Board review and reassess the next round of priorities and create a similar plan.

# 2022 Strategic Plan Action Items

Below are the overarching three strategic priorities for the NCRF Trustees.

1. **Create a Cradle to Retirement Strategy to Increase Member Engagement**
2. **Public Relations for Foundation**
3. **Work with NCRA on Getting More Students into the Profession**

## ***Strategic Goal:***

## **Create a Cradle to Retirement Strategy to Increase Member Engagement**

## ***Action Steps:***

Implement a plan that allows NCRF to assist NCRA with a long-term membership recruitment and retention policy that ensures we maximize potential members' engagement with NCRA/NCRF throughout their entire careers. The goal is to make NCRA/NCRF the "go-to" resource and preferred association for those coming out of school and into each phase of their reporting/captioning career. Quarterly data will show progress.

Actions steps are as follows:

1. Create a "marketing" survey to identify what benefits are needed for each demographic (student, new professional, mid-career, late-career, retirement) to help our members with their day-to-day jobs and career development, so they stay engaged with us
2. Create Education Modules
  - a. New graduates
  - b. New Professionals – year 1-5
  - c. Cross Training (mid-career)  
Freelance/Official/Captioner
  - d. Transition modules
  - e. Short/focused Zoom education modules (free to members/nominal fee for nonmembers)
3. Mentor bank – speaker bank – "Ask Me" sessions
4. Vendor training during Conference – sponsored by NCRF

5. Create a positive NCRF testimonial campaign to highlight energy and passion of our members

*Timeline:*

1. Marketing survey – NOW
2. Education Modules – starting now and ongoing as modules are developed
3. Mentor Bank – 6–12 months (Trustees to add names)
4. 6–18 months
5. Ongoing

*Responsibility:*

1. Marketing department
2. Professional Development department
3. Education committees: TBD
4. NCRF
5. Jill Landsman and PR committee

*Prioritization:*

High

***Strategic Goal:***

**Public Relations for Foundation**

*Action Steps:*

We spent a lot of time discussing how the Foundation is not that visible to members and nonmembers. Understanding that membership is the lifeblood of the organization, it is crucial to re-engage members by getting them more involved in the organization. The pandemic has further exacerbated the isolation of remote work and has led to people pulling back from most types of engagement. Creating new ways for members and prospects to engage with NCRF will be critical to fighting apathy and invigorating the passion and interest of individuals.

Actions steps are as follows:

1. Communicate what the contributions do/accomplish
2. Use NCRA Town Hall to spotlight Foundation
3. Semiannual newsletter email to membership
4. Social media PR campaign of Foundation's accomplishments
5. Create FOMO (Fear of Missing Out)

6. Meet your Trustees content on social media (creating relationships with personal stories)
7. Spotlight grant recipients and what the money did for them
8. Highlight "Why I Give to NCRF"

*Timeline:*

1. Six months focus on Nov./Dec.
2. Once a year
3. Every six months
4. Ongoing
5. Ongoing
6. Once a quarter
7. Ongoing
8. Begin immediately and start with asking all current Angels

*Responsibility:*

1. NCRF Chair, Jill Landsman, and John Dripps
2. NCRF Chair or Chair's various designees appear for a segment on the Town Hall
3. Jill\*, Annemarie\*, and the Chair
4. Chair, Colin\*, and Trustee helper (e.g., Rich)
5. Rich
6. All Trustees (use Meet the Trustee template) and submit to Annemarie\*, Communications, Chair, Jill\*
7. Jill coordinates with the Chair or Trustee to talk to them
8. The marketing department puts out submitted information from Trustee (once a month turn to reach out to them)

*Prioritization:*

High/Medium

***Strategic Goal:***

**Work with NCRA on Getting More Students into the Profession**

*Action Steps:*

Understanding that the lack of students getting into court reporting school in vast numbers is a major issue. The NCRF Board of Trustees would like to assist in this. We feel that it is critical for NCRA/F for the livelihood of the profession, and we would like to contribute to the future. NCRF has been very good at preserving the past and we



feel it is the Foundation's obligation to assist where possible in shaping the future.

Actions steps are as follows:

1. Work with/support NCRA A to Z staff/committee
2. Get NCRA A to Z program in high schools nationwide
3. Marketing, social media, including awareness of stenography for high schoolers
4. Videos to recruit
5. Retention of students. Motivate and mentor

*Timeline:*

1. Ongoing but get more involved
2. Ongoing
3. Now thru 18 months and regroup
4. Zero to six months startup
5. 12 months

*Responsibility:*

1. Trustee liaison to work in concert with the committee
2. NCRA staff person (Lisa Dennison\*)
3. NCRA marketing department and CLVS volunteer resources
4. Social media person at NCRA
5. Work with Professional Development current mentor program

*Prioritization:*

High

# Conclusion

The National Court Reporters Foundation is truly fortunate in many circumstances. It has a caring and forward-thinking Board and a knowledgeable staff, and it survived the pandemic better than most associations. Dave Wenhold has done more than two dozen strategic plans in the past five years for different groups. If NCRF can successfully implement many of the tasks identified in the SP, it will be a great leap forward in the members' return on their investments as well as the time spent by the Board to create this plan.

We are honored to work with such dedicated and hardworking volunteers. We understand that the organization is charging ahead and working on increasing member value, thanks to the passion and dedication of the volunteer leadership. Through our collaboration with NCRF leaders, with the implementation of many of the recommendations in the strategic plan, the Association will enhance its organizational effectiveness, long-term sustainability, and increased member satisfaction. We recommend that NCRF does a six-, nine-, 12-, and 18-months check-in to ensure that implementation and the strategic plan itself remains meaningful.

*\*Names with an asterisk indicate an NCRA or NCRA staff liaison.*



***NCRA.org/Foundation***