Strategic Plan
2019-2021
NCRA Board of Directors approved May 2, 2018
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**NCRA Mission**

NCRA promotes excellence among those who capture and convert the spoken word to text and is committed to supporting every member in achieving the highest level of professional expertise.

**NCRA Vision**

To be the leading authority on court reporting and captioning.

**NCRA Values**

| LOYALTY | Leadership and staff exhibit **trust**, **honesty**, and **loyalty** as they work toward fulfilling the NCRA mission |
| COLLABORATIVE ENVIRONMENT | **Communication**, **engagement**, **diversity**, and **creativity** create the optimal collaborative environment in which to successfully complete organization initiatives |
| EXCELLECE | On the path to mission fulfillment, NCRA leaders and staff operate as mission-centric professionals with **integrity** and **accountability** |
| RESPECT | NCRA leaders and staff hold members, volunteers, and partners in the highest **regard** |
| PASSION | **Passion** for NCRA’s vision, mission, and court reporting and captioning industry unifies NCRA leadership and staff and moves us forward |
I. **Build and operate a sustainable business and financial model.**

- **FY19** – cut operational deficit by 1/3 (resulting in $308,000 deficit)
- **FY20** – cut operational deficit by 1/3 (resulting in $154,000 deficit)
- **FY21** – reach operational break-even

**A. Increase revenue and better manage resources to become operationally profitable.**

- Timeline: Ongoing (FY19/FY20/FY21)
- Accountability: Staff to propose/manage budget, Board to approve annual budget
- Resources: No additional resources beyond operating budget
- Evaluation:
  - Utilize reserves for investments in strategic plan initiatives designed to support shift to sustainable model
  - Progress reported at Board meetings

**B. Develop an Annual Business Plan based on our Strategic Plan.**

- Timeline: Annually (November) FY18/FY19/FY20
- Accountability: CEO
- Resources: No additional resources beyond operating budget
- Evaluation: Year-end review of annual operational performance and communication of high-level operational plan for upcoming year

**C. Increase membership of captioners, scopists, proofreaders, and others.**

- Timeline: Ongoing (FY19/FY20/FY21)
- Accountability: Staff
- Resources: No additional resources beyond operating budget
- Evaluation: Success will be defined in the annual business plan

**D. Improve communication and better articulate value to membership.**

- Timeline: Ongoing (FY19/FY20/FY21)
- Accountability: Board and Staff
- Resources: No additional resources beyond operating budget
- Evaluation: Success will be defined as consistent incremental progress, specifically as it relates to member retention, engagement, and survey feedback

- **FY19**
  - Maintain retention at 87% (above industry standard) in FY19
  - Increase engagement in events and education by 5% over FY18
  - Develop an annual member survey, administered by NCRA, FY19 to serve as baseline
  - Performance to goals will be reported by CEO to BOD annually

- **FY20**
  - Maintain retention at 87% (above industry standard) in FY20
  - Increase engagement in events and education by 5% over FY19
  - Annual member survey, administered by NCRA, comparison to FY19
  - Performance to goals will be reported by CEO to BOD annually
E. Prioritize NCRA resources to create and grow programs that are, or have the potential to be, profitable and yield the strongest results in accomplishing our mission and eliminate those that do not meet objectives.

- Timeline: Ongoing (FY19/FY20/FY21)
- Accountability: Staff
- Resources: No additional resources beyond operating budget
- Evaluation:
  - FY19: Staff will conduct a systematic review of programs and establish written objectives, plans, and goals to enhance each program
  - FY19/FY20/FY21: Programs will be reviewed annually and those programs that are underperforming, or lack potential to yield significant ROI, will be modified to improve performance or eliminated

F. Proactively engage corporate partners (sponsors, firms, corporations, and other stakeholders) to increase non-dues revenue and better leverage resources.

- Timeline: Ongoing (FY19/FY20/FY21)
- Accountability: Staff
- Resources: No additional resources beyond operating budget
- Evaluation:
  - Increased revenue and deficit reductions:
    - FY19: $50,000 over FY18
    - FY20: $75,000 over FY19
    - FY21: $100,000 over FY20

G. Develop a plan to strengthen financial partnership with National Court Reporters Foundation.

- Timeline: FY20
- Accountability: Staff
- Resources: No additional resources beyond operating budget
- Evaluation: Completion of plan presentation to BOD by year-end 2019
II. Position our profession and association for the future.

A. Be more inclusive by adding captioning to our name and becoming the National Captioners and Reporters Association (NCRA).
   - Timeline: FY19
   - Accountability: Staff
   - Resources: Investment of reserve funds ($10,000)
   - Evaluation:
     - Pending C&B vote – August 2018
     - Launch/completion of name change in 2019

B. Develop an awareness campaign to engage prospective new members and communicate the value of court reporters and captioners joining forces to drive growth and advocate for the profession.
   - Timeline: FY19
   - Accountability: Staff
   - Resources: Investment of reserve funds ($50,000)
   - Evaluation:
     - Greater press/media hits
     - More traffic/opt-ins on our website
     - More members

C. Embark on a rebranding initiative to update the image of stenography as a highly skilled, technical profession that is relevant today and for the future and to establish NCRA as the leading authority of a growing profession. Develop an awareness campaign to build wider recognition and appreciation of stenography profession among key audiences (1) strategic alliances that have the ability to drive demand for NCRA certifications, (2) consumers of our members’ services, (3) potential members/students (4) existing members and (5) stakeholders/decision makers within the education community that can help develop talent pool to meet increased demand for court reporters and captioners.
   - Timeline: Ongoing (FY19/FY20/FY21)
   - Accountability: Staff
   - Resources: Investment of reserve funds ($200,000 over 3-year period)
   - Evaluation: Completion of rebranding initiative, performance to campaign objectives reported annually to BOD

D. Management Team to identify and define strategic alliance opportunities. Research the needs, interests and demographics, and focus on the size, trends, and potential growth/impact of the prospective alliances. Identify benefits prospective strategic alliances could gain through a relationship with NCRA. Identify and prioritize potential organizations that could best assist NCRA’s efforts to increase:
   - demand for the skills/services our members provide
   - awareness, need, and perceived value of certification and testing
   - awareness for highly skilled, technical, growing profession
   - cultivation of future talent/pilot educational programs (high schools, technical/vocational schools, etc.)
   - member value
   - revenue
E. Continually develop educational content to reflect changing needs of marketplace.

- Timeline: Ongoing (FY19/FY20/FY21)
- Accountability: Staff
- Resources: No additional resources beyond operating budget
- Evaluation: Completion of Management Team’s insights and prioritized opportunities to BOD annually

F. Strengthen NCRA’s governance policies and Board culture to reflect the strategic role of the Board and expectations for leadership and engagement as the association evolves.

1. Develop and commit to a responsibilities matrix that clarifies decision-making authority between the Board and staff
   - Timeline: In progress
   - Accountability: Board and Staff
   - Resources: No additional resources beyond operating budget
   - Evaluation:
     - Adoption by Board (March 2018)
     - Changes to responsibilities matrix require Board vote

2. Develop a Board agenda and deliberation process that reinforces the strategic role of the Board in monitoring the progress of the NCRA strategic plan
   - Timeline: Ongoing (FY19/FY20/FY21)
   - Accountability: Board
   - Resources: No additional resources beyond operating budget
   - Evaluation: Adoption/commitment by Board

3. Develop an in-depth Board orientation for incoming and future directors that focuses on supporting directors in a strategic role and clarifying the roles and responsibilities and decision-making processes and reporting structure
   - Timeline: Ongoing (FY19/FY20/FY21)
   - Accountability: President of the Board and Staff
   - Resources: No additional resources beyond operating budget
   - Evaluation: Adoption/commitment by Board
III. Increase demand for NCRA certifications.

➢ FY19: 3.5% increase in test candidates; 3.5% increase in credential holders (based on proposed new certification approval)

➢ FY20: 4% increase in test candidates; 4% increase in credential holders (based on proposed new certification approval)

➢ FY21: 4.5% increase in test candidates; 4.5% increase in credential holders (based on proposed new certification approval)

A. Develop strategic alliances that have the potential to increase demand for NCRA certifications.

1. Utilize findings from Management Team's efforts to assist NCRA in identifying/prioritizing strategic alliance opportunities that will yield the most ROI and increase demand for NCRA certifications
   - Timeline: Ongoing (FY19/FY20/FY21)
   - Accountability: Staff
   - Resources: No additional resources beyond operating budget
   - Evaluation: Presentation of Management Team’s insights and prioritized opportunities to BOD annually

2. Educate potential alliances and other key stakeholders on the importance and value of NCRA certification
   - Timeline: Ongoing (FY19/FY20/FY21)
   - Accountability: Staff
   - Resources: No additional resources beyond operating budget
   - Evaluation: Success will be defined as consistent incremental progress in awareness and perceived value
     - FY19: Methodology TBD
     - FY20: Methodology TBD
     - FY21: Methodology TBD

3. Explore strategic alliance potential and develop agreements that outline specific objectives and ways to measure effectiveness of agreements
   - Timeline: Ongoing (FY19/FY20/FY21)
   - Accountability: Staff
   - Resources: No additional resources beyond operating budget
   - Evaluation:
     - Implement 1 new strategic alliance annually, performance to agreement objectives reported to BOD annually
B. Elevate NCRA’s role as an industry advocate and work to advance quality standards.

1. Strengthen relationships with NCSA, state associations, and state governments to create more value for national membership and certification and deliver value at the local level
   - Timeline: Ongoing (FY19/FY20/FY21)
   - Accountability: Staff
   - Resources: No additional resources beyond the operating budget
   - Evaluation: Add 1 state per year that requires or recognizes NCRA certification

2. Protect and advance the interests of court reporters and captioners at the federal level by educating, lobbying, and influencing legislators and bureaucrats
   - Timeline: Ongoing (FY19/FY20/FY21)
   - Accountability: Staff
   - Resources: Outsourced government relations support
   - Evaluation: Form a legislative strategic plan for 2019, presented to the BOD in 2019

C. Develop a communications plan that articulates the value of NCRA’s advocacy efforts to schools/programs, members, and strategic alliances.

   - Timeline: Ongoing (FY19/FY20/FY21)
   - Accountability: Staff
   - Resources: No additional resources beyond the operating budget
   - Evaluation: Increase certification/testing by 3.5%
NCRA Strategic Plan Implementation and Monitoring

First and foremost, it is extremely important that leaders in the organization have a strong understanding and appreciation of the basic principles of successful change in organization. Turnaround initiatives require courage, commitment, and a significant amount of energy and time.

In order for NCRA’s strategic planning efforts to be successful, Board and Staff need to:

<table>
<thead>
<tr>
<th>Task</th>
<th>Responsible Party</th>
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<tbody>
<tr>
<td>Authorize and commit to the Strategic Plan</td>
<td>Board</td>
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<tr>
<td>Develop/update performance goals for CEO</td>
<td>Board</td>
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<tr>
<td>Allocate the resources necessary to implement the Strategic Plan</td>
<td>Board</td>
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<td>Create work plans for Board and committees that are in alignment with the Strategic Plan</td>
<td>Board</td>
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<tr>
<td>Develop/update policies and procedures of Board to guide activities toward implementing the strategies and action plans</td>
<td>Board</td>
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<tr>
<td>Develop/update performance goals for staff</td>
<td>Staff</td>
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<td>Develop/update job descriptions, performance evaluations, committee action plans, and staff action plans to be in alignment with the performance expectations necessary to implement the Strategic Plan</td>
<td>Staff</td>
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<td>Create monthly staff status reports to CEO that focus on the tasks required to work toward the accomplishment of the Strategic Plan</td>
<td>Staff</td>
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<td>Structure staff meetings to focus on strategic plan progress</td>
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<tr>
<td>Develop CEO report at each board meeting to focus on strategic plan process</td>
<td>Staff</td>
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