



# Strategic Plan

## Goals

*Membership Service and Growth*  
*Education and Resources*  
*Advocacy and Government Relations*  
*PR and Professional Awareness*  
*Certification and Credentials*  
*Model Association in the USA*  
*Adequate Staffing*

**Goal #1: Membership Service and Growth** – Providing benefits, services and activities that promote association growth.

- A) **Recruitment** - Rely on three committees to increase membership beyond 50% market penetration (Membership, FORCE, Student.)
- 1) Expand membership committee to have enough members for personal contact with a ratio of 30 prospects per committee member (48 members on the committee.)
  - 2) Net membership increase by 10% per year.
  - 3) Maintain conversion rate of at least 50% of new CSRs joining TCRA in their first year.
  - 4) Promote student membership incentives and discounts.
- B) **Retention** – Increase current retention rate above 80%, eventually retaining 90% each renewal period.
- C) **Billing Technology** – Explore feasibility of implementing 12 month annual dues cycle (rather than pro-rated fees throughout the year) by examining staff, software and bylaws considerations.
- D) **Benefits and Services** – Improve member and prospective awareness of TCRA's benefits, services, efforts and achievements.
- 1) Create testimonials (video, articles, Facebook) to promote how benefits give members an advantage.
  - 2) TCRA booth at convention promoting the benefits and distributing information.
  - 3) Seek to create a golden handcuff benefit by analyzing benefits and services in other associations that are strong enough to ensure that members value the association and renew for their career lifetime.
  - 4) Develop tangible benefits such as how-to manuals and compliance guides, developed by committees and experts, that become the intellectual property of TCRA.
  - 5) Create a values statement for website, magazine or membership mailing that demonstrates how the membership investment is greatly surpassed by savings and services provided.
  - 6) Consider programs and offerings that can be endorsed by TCRA to offer members with a royalty to the association, i.e., office supply discounts, bookstore discounts, etc.
  - (7) Develop for new CSRs a guidebook of tips and terminology for professional success.

**Responsible Committees:** Membership, Student, FORCE, Publication Committee, Commemorative, Local Associations.

**Goal #2: Education and Resources** – Anticipating the needs of members and offering education created and delivered in the form of meetings, networks and sources of information.

**A) Meetings and Conferences**

- 1) Plan annual convention to facilitate the education and networking of the profession; ensure profitability and increase attendance.
- 2) Replace the mid-year conference with regional seminars.
- 3) Plan annual fall Boot Camp capable of registering 100 persons and offering 5.5 CE hours.

**B) On-Line Education through TCRA Portal**

- 1) Develop webinars for registration by members and prospects on key topics.
- 2) Expand on-line educational offerings; sharing profit with persons who have existing programs.
- 3) Transfer conference videos to website in a timelier manner.
- 4) Develop podcasts for members' access.

**C) Manuals** - Develop booklets, manuals and CDs to sell based on expertise of committees, instructors and association leaders, i.e., "UFM Fundamentals." Protect as the intellectual property of TCRA.

**D) Mentoring** – Promote access to expertise through the local associations.

**E.) Position Papers** – Develop position papers/white papers that provide rationale for positions and responses by members.

**Responsible Committees:** Convention, Ethics, Regionals, Technology, Law Book, FORCE, Officials, Freelance, Education.

**Goal #3: Advocacy and Government Relations** – Serving as the preeminent voice of the stenographic court reporting profession in Texas.

**A) Lobbyist** – Maintain TCRA lobbyist to monitor and influence regulation detrimental to court reporters.

**B) F.A.I.R. PAC** – Utilize the TCRA Political Action Committee to influence political and judicial campaigns to benefit the profession; strive for maintaining a minimum fund of \$40,000 contributed by members.

**C) Legislative Fund** – Continue to solicit members to voluntarily contribute to the Legislative Fund line item to defray lobbying costs.

**D) Participation and Collaboration** – Continue to be actively involved in government and private organization meetings that affect court reporting.

**E) Capitol Presence** – Take advantage of opportunities to be at the Capitol to increase lawmaker awareness of court reporters through fund raisers, receptions or a planned Day at the Capitol.

**F) Local Grassroots Efforts**

- 1) Local Associations to annually host an event for elected and appointed officials to acquaint them with the profession; develop a template for Local Associations to follow.
- 2) Participate in the election/re-election campaigns for lawmakers who support the positions of the profession.

**Responsible Committees:** Legislative, CRCB Liaison, Officials, Freelance, Judiciary Liaison, Court of Appeals, Supreme Court, Local Associations.

**Goal #4: PR and Professional Awareness** – Ensuring that the profession is understood and respected.

- A) **Website and Facebook** – Maintain relevance of TCRA on the web.
  - 1) Maintain job board on website.
  - 2) Require membership password to access core knowledge and benefits of belonging.
  - 3) Monitor website and Facebook to ensure they stay current and of value to visitors.
  
- B) **Career Awareness** – Reach out to schools and students to promote interest in the profession.
  - 1) Promote court reporting profession to high schools and middle schools with directors and Local Associations targeting schools.
  - 2) Ascertain from officials (school administrators, school boards) the proper access and protocols for presenting career information to high school and middle school students.
  - 3) Utilize TCRA video.
  
- C) **Cause Marketing** – Position TCRA by associating it with a related cause, i.e., books, words, etc.
  - 1) Explore sponsorship of district or state Spelling Bee.
  - 2) Identify other non-profit causes that best position TCRA through sponsorship and/or participation.
  
- D) **Officials and Judiciary** – Maintain relations with Officials, Freelancers and Judiciary through appropriate liaisons.
  - 1) Update FAQ (frequently asked questions) on website.
  - 2) Realtime 101.
  
- E) **Bar Associations** – Interface with Local Bar Associations and Trial Bar to identify collaborative programs that position court reporters with lawyers.
  - 1) Consider pro-bono reporting service at Local Bar Association member memorials.
  - 2) Create opportunities for members to educate law clerks regarding the role and responsibilities of court reporters.
  
- F) **Law Schools** – Maintain relations with law schools.
  
- G) **Pro Bono Services** – Improve member awareness of pro-bono benefit and opportunities through Supreme Court and Local Bar Associations.
  - 1) Promote community service through Local Associations and CSRs.
  - 2) Consider encouraging members to participate in “Just Take One” initiative of the courts to serve indigent cases one evening a year.

**Responsible Committees:** Hall of Fame, Distinguished Service Award, Pro-Bono, Deaf/Hard of Hearing, Officials, Freelance, Judiciary Liaison, Court of Appeals, Supreme Court, Technology, Public Relations, Student.

**Goal #5: Certification and Credentials** – Promoting career development and standards of excellence through certification and credentialing.

**A) Specialization Credentials**

- 1) Work towards developing eight specialization credentials over the next three years to position member expertise.
- 2) Validate exams through psychometrician.
- 3) Introduce first specialization in 2010, three in 2011 and remaining in 2012.

**B) Certification Awareness**

- 1) Promote the importance, benefits and value to attaining specialized credentialing.
- 2) Educate officials to the importance and distinction of certifications.
- 3) Clarify for members the do's and don'ts of using the CSR designation and the phrase "board certified."

**Responsible Committees:** Specialization Exams, CART.

**Goal # 6: Model Association in the USA** – Maintaining a structure, leadership and resources to effectively advance the profession and serve the membership.

**A) Committees** – Relying on volunteers working in committee and task forces.

- 1) Be responsive to members who volunteer and expect to hear a response; plan a conference call to introduce committee members to each other.
- 2) Align committees with the goals in the strategic plan; committees to provide a program of work to report on what they will achieve within the strategic plan.

**B) Volunteer Leaders** – Maintain a corps of volunteer leaders and board members to govern the association effectively.

**C) Fund Raising** – Identify efforts to increase financial strength of TCRA.

- 1) Create a video to inform members of the importance of the special funding efforts.
- 2) Increase member awareness and participation in F.A.I.R. PAC and Legislative Fund line items.
- 3) Increase general fund income through raffles.

**D) Allied Organizations** – Maintain excellent relations with court reporting associations.

- 1) Keep members aware of the resources and opportunities in NCRA.
- 2) Monitor the State Associations to provide information to members.

**E) Local Associations** – Promote strength and activities of the local associations.

- 1) Develop a guide book, "Starting and Operating a CR Local Association"
- 2) Create new Local Associations, starting with Austin, followed by El Paso, Midland/Permian Basin, Lubbock, and Beaumont/Golden Triangle.
- 3) Strengthen Local Associations in need.

**Responsible Committees:** Fund Raising, Local Associations, Forward Planning, Bylaws, Nominating, Budget, F.A.I.R. PAC.

*Goal #7: Adequate Staffing* – Employ effective staffing to manage the growth of the association.

- A.) Ensure that staff is adequate to advance the strategic plan and serve members with a professional degree of customer service.
- B.) Consider need for an IT/technology position or outsource.
- C.) Maintain consultants such as lobbyist, auditor and attorneys.