



CalCourt

Strategic

Business Plan

Adopted: [Date]



Strategic Business Plan

Introduction

The California Court Association (CCA) was formed in June 1952 with an initial membership of 135. In 2015, CCA's membership has grown to well over 3,000 individuals. Regular membership is open to all employees of California courts. Any person employed in California by a court-related governmental entity may apply for membership and any regular member who has retired from his or her position in a California court may continue membership as a retired member.

The CCA Strategic Business Plan was created during a 1 and ½ day planning session held November 18 & 19, 2015 at the Ayres Ontario Convention Center Hotel in Ontario, California. A committee made up of the CCA Executive Board plus the CCA Training Co-Chairs comprised the Strategic Planning Committee. The dialogue at these sessions was facilitated by CCA Executive Director and Strategic Consultant Ross Hutchings, Certified Association Executive (CAE). The group reviewed a brief history of the organization, current mission and objectives of the organization. They then spent time examining issues that impact the courts and CCA, as well as challenges that face the organization today. Upon careful consideration of the role of the organization, this group developed a vision, including core values, core purpose, a definitive long-range goal, and vivid description. They re-examined and rewrote their mission. Then utilizing strategies (categories) from previous association strategic plans, and through a series of exercises, the group was able to identify specific goals they would like to accomplish. In addition they identified action steps to achieve these goals. This is a draft copy of the long-range Business Strategic Plan. A shorter period, 12- to 24-month, Operational Plan will be created by the executive board.

The purpose of the strategic plan:

1. To gain a clear understanding of the organizational purpose and stay focused on delivering measures that will increase membership and grow enthusiasm for CCA.
2. To identify the critical issues and challenges relative to the organization.
3. To create a vision for CCA.
4. To reexamine and modify the CCA mission.
5. To develop a 2016-2017 business plan with goals, strategies, initiatives and action tasks.
6. To determine ways to get the resources necessary to accomplish these tasks.

The Strategic Business Plan is to be used as a guideline for the effective leadership and basis for communication of the CCA role and mission. The intent is to provide a sharp focus and a clear direction for CCA leadership and volunteer leaders to use their limited resources to the best use in moving the organization forward, meeting challenges, and achieving the agreed-to goals.



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Focus on the Future — The 2016 Plan

CCA Core Purpose

We are an organization that aspires to help all employees of California Trial Courts by providing opportunities to learn, grow, collaborate, share, and excel. We value each individual and provide opportunities for them to develop their knowledge, therefore the Core Purpose (motivation) of the California Court Association is:

To support personal and professional growth

Long-Range Definitive Goal

As an organization we have direction, our ultimate goal that we strive for:

To have 100% membership in every court in California

CCA Mission

Realizing our vision (core values and purpose) we have defined the CCA organizational mission as:

To provide a forum for education & best practices in the development of court professionals

CCA Brand Promise

As an organization, we are here to provide the tools to accomplish the CCA Mission and achieve CCA's Core Purpose. In order to do that, CCA makes the following Brand Promise to our members:

Through training and education CCA will be the leader in assisting every court employee in their quest for greater knowledge for the betterment of their court

Measurable Elements

1. Increased membership (greater percentage) from all courts throughout California by diversifying and broadening CCA's programs.
2. Improved education activities as well as establishing the CCA conference as THE event for CA court employees.
3. Increase resources to provide a dynamic organization to meet the needs of CA court employees.
4. Growing participation in CCA activities through greater cooperation from courts.
5. Establish CCA as the portal of information necessary for California court employees to stay abreast of current laws, standards, best practices, and emerging trends that may affect court management and operations.



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Strategic Goals

We will perform effectively by delivering on the organization brand promise through the implementation of goals in these four categories:

Organizational Governance

- Review and re-align Board and Executive Committee
- Rewrite bylaws
- Develop Policies and Procedures Manual

Membership Services

- Increase membership by 10%
- Have an effective, active Membership Committee
- Develop a mentorship program
- Have CCA involvement in every county court

Education and Professional Development

- Overhaul certification program
- Increase statewide training
- Expand education by offering relevant training
- Develop online training
- Expand publication offerings

Communications

- Create a Communications Committee
- Create new brand
- Develop regular communications with members and public
- Develop a marketing strategy/plan
- Develop new membership marketing material
- Develop new website

Financial Strategy

- Financial analysis and consolidated reporting
- Establish budgeting protocol
- Increase reserves to 1 1/2 year operating expense
- Evaluate current and future revenue streams



Strategic Business Plan

Strategic Process and Background of the Plan's Creation

The California Court Association (CCA) Strategic Business Plan was prepared based on a 1 and ½ day session held November 18 & 19, 2015 at the Ayres Ontario Convention Center Hotel in Ontario, California. A committee made up of the CCA Executive Board plus the CCA Training Co-Chairs comprised the Strategic Planning Committee. The dialogue at these sessions was facilitated by CCA Executive Director and Strategic Consultant Ross Hutchings, Certified Association Executive (CAE). The group reviewed a brief history of the organization, current mission and objectives of the organization. They then spent time examining issues that impact the courts and CCA as well as challenges that face the organization today. Upon careful consideration of the role of the organization, this group developed a vision, including core values, core purpose, definitive long-range goal and vivid description. They reexamined and rewrote their mission. Then utilizing strategies (categories) from previous association strategic plans and through a series of exercises, the group was able to identify specific goals they would like to accomplish within the next 12 - 24 months. In addition they identified action steps to achieve these goals. This is a draft copy of the Vision, Mission and Operational Plan.

The purpose of the strategic plan:

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Current Situation

Our first step was to look at external and internal forces that might have an impact on the courts, members and the organization as a whole.

Macro Inspection

What is happening globally, nationally and locally that could have an impact on CCA or its members:

- Uncertainty in economy
- Skill shortage
- Generational differences
- Loss of institutional knowledge
- Shift in lower budgets for courts [i.e. reallocation of state budget funding based on workload]
- Large increase in hiring for some courts
- Moving to consolidated case management
- Lack of support for CCA by some courts
- Shifting case loads
- Amnesty program
- Courts have morphed into social service, parole and probation agency
- CCA is an approved provider of continuing education for employees of the judicial branch

Micro Inspection

Looking closer at what is going on within the State, Counties as well as within CCA that may have an impact on organization, leaders and members:

- Decreased membership during recession, beginning to see slight increase
- Group membership vs. incentive (individual)
- Change in management team
- Loss of support from Judicial Council
- Significant change in Committees
- Relying on past, not looking to future
- Technologically challenged
- Not innovative enough
- Lack of adequate resources
- Non-diversified sources of income

Association Challenges

CCA faces a number of challenges as an organization of court employees in the large and diverse state of California:

1. Courts throughout the state are inconsistent in their support for their court employees to join the professional association (CCA).
2. Decreased trial court budgets which restricts or limits support of professional education of court employees.



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3. Lack of perceived value of membership in CCA.
4. As an inclusionary organization (encourages and accepts membership in all levels of court organization) creates challenges to appeal to important issues within each group.
5. Attracting members from all 58 counties, broadening the appeal of CCA to executive, managerial, and professional classifications, and recruiting volunteers for CCA leadership, committee chairs, and committee members.
6. Lack of resources necessary to grow the organization.

Association Opportunities

Likewise, there are a number of opportunities to counter-balance the challenges posed to CCA:

1. Due to expansion as well as retirements, many courts are hiring new employees, who have a greater need for education and training.
2. Court budgets are improving, freeing up funds for courts to support membership and participation in CCA.
3. More court CEO's were past members of CCA and/or understand the value of a professional association and are willing to support their employee's involvement in CCA.
4. Greater need for professional development and training in areas not currently serviced by the state, trial courts, or other entities.
5. Participating in CCA's training programs not only provides professional education, opportunities for networking, and a social aspect that does not exist in the member's every day court environment.

CCA Core Values

- | | | |
|--------------|----------------------------|------------------------|
| ☞ Honesty | ☞ Leadership | ☞ Personal and |
| ☞ Community | ☞ Accountability | Professional Growth |
| ☞ Integrity | ☞ Service-Driven | Dependability |
| ☞ Creativity | ☞ Professionalism | ☞ Personal Achievement |
| ☞ Discovery | ☞ Camaraderie | |
| ☞ Morals | ☞ Confidentiality | |
| ☞ Excellence | ☞ Value Individual Efforts | |



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SWOT Analysis

To fully understand how all these issues affect CCA, an organizational SWOT (strengths-weaknesses-opportunities-threats) analysis was conducted covering leadership, member/partnership development and program effectiveness with concluding remarks.

| | |
|---|---|
| <p>Strengths (present advantages)</p> <ul style="list-style-type: none"> • Diversity • History/longevity • Experience • Captive audience • Quality training • Low cost (dues & training) • Directory • Some courts paying dues • Dedication of volunteers • Well respected • CA – destination (locations) • Leadership • Management • Openness (desire) for change • Networking (camaraderie) • Friendships/relationships • Consistency – Uniformity | <p>Weaknesses (present disadvantages)</p> <ul style="list-style-type: none"> • No follow through on goals • Constant turn over • Lack of marketing (tooting our own horn) • Lack of communication among members • Skills & ability of leadership • Lack of accountability • No formal mentorship • No training for leaders • Following rules, procedures & policies • Governance structure • Provincial • Lack of pathway to leadership • Volunteers Exempt vs Non Exempt • Positive message (value of CCA) to directors • Not understanding of boundaries • Need for funding – new sources • No strategic direction (pet projects) |
| <p>Opportunities (potential advantages)</p> <ul style="list-style-type: none"> • New employees, more training • Fill training needs not being filled by state • Distribution of training materials • On-line training • Wider distribution of newsletter • Locate other groups to provide training • Huge membership growth potential • “Honeymoon” (justification) for change • Provide positive attention of organization • Provide the fun/positive in our industry • Institutionalize mentorship • Provide leadership training • Provide a value proposition • Utilize knowledge of member talents/abilities | <p>Threats (potential disadvantages)</p> <ul style="list-style-type: none"> • Change or parish • Revenue (control expenses) • Internet competition • Loose respect • Not being flexible & dynamic • Ensuring operate within rules of courts |



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Key Issues from Analysis

Given this organization evaluation, the following key issues were identified as important to be acted upon for CCA to gain the best advantage possible:

1. Acute need to reorganize the governance structure including Board and bylaws, to be more inclusive and distribute volunteer workload, provide thorough training for volunteer leaders to be successful, provide pathway to leadership and adequate staff support to accomplish goals
2. Be dynamic as an organization to take advantage of opportunities within the profession as they arise
3. Focus on membership growth, targeting courts that do not currently support the organization
4. Further develop sources of revenue by diversifying income including increased membership & training registration fees along with decrease expenses including limiting number of paid leaders to attend all events
5. Increase and improve communication including method to communicate directly without having to go through Directors
6. Retain institutional knowledge by including past active members, yet keep an eye to the future by including new members and developing new ways to deliver brand promise

New Directions for Success

In order to successfully move CCA forward, critical new directions will be required:

1. Organizational governance and management assessment
2. Review of a proactive and increased membership base
3. Improved communication and expanded education/information-sharing
4. Effective follow-through on the organization brand promise
5. Implementation of an ongoing, rolling, agreed-to 18 month strategic business plan with allied annual programming strategies and appropriate budget allocation

Vision

An extensive “visioning” exercise was conducted. The Core Values (listed in the Executive Summary) were discussed and explored.

Core Values

| | | |
|-----------------|----------------------------|--------------------------------|
| Honesty | Leadership | Dependability |
| Integrity | Accountability | Personal achievement |
| Professionalism | Service-driven | Personal & Professional growth |
| Community | Camaraderie | |
| Morals | Confidentiality | |
| Excellence | Valuing individual efforts | |



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Core Purpose

To support personal & professional development

Definitive Long-Range Goal

To have 100% membership of every court in California

Vivid Description

CCA will have all funding (unlimited resources) necessary to produce all programs we desire. The governor and Leg Council will revere CCA and ask for our assistance in helping provide exceptional court and professional training. CCA will have retired court employees as CCA trainers for all who request. We will have a train-the-trainers course. Our website will be exceptional with current data, info, sector blogs and online courses. CEO's and interpreters will have committees within CCA. We will have developed state wide standard curriculum. Our conference will have thousands attending with full-blown tradeshow and training courses. Other states will seek our advice and purchase programs from us.

Mission and Brand Promise

A revised mission statement was developed for CCA as follows:

Mission

To provide education & Collaboration for the development of court professionals

Brand Promise

Through current training and education, CCA will be the leader in assisting every court employee in their quest for greater knowledge for the betterment of their court



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Organizational Strategies

To help organize and focus ideas for potential goals; begin the process of implementing the mission; and delivering on the brand promise; five strategies (categories) were created where specific goals were developed within each strategy:

Organizational Governance

- Through internal review and reorganization, establish a structure that is dynamic and inclusive; spreads the workload; includes representative power base; and creates a pathway to leadership

Membership Services

- Increase quantity and diversity of members throughout the state; and their involvement for personal and organizational growth

Education and Professional Development

- Support and provide meaningful branded education and training opportunities

Communications

- Improve our ability to communicate consistently to every member, as well as potential members

Financial Resources

- Operate and grow a dynamic, fiscally responsible and accountable membership-based organization



Strategic Business Plan Appendix

CCA Strategic Planning Group

2015 Strategic Planning Committee

Alicia Fletes, *President*
San Diego Superior Court

Tanya Rivero, *Vice President*
Ventura Superior Court

Lorraine Benavides, *Vice President*
Ventura Superior Court

Tina Dabbas, *Secretary*
San Bernardino Superior Court

James Feenan, *Treasurer*
Santa Clara Superior Court

Suzanne Schleder, *Past President*
San Joaquin Superior Court

Brenda Lussier, *Member-At-Large*
Riverside Superior Court

Corinne Vallieres, *Co-Chair*
Training & Certification Committee
Riverside Superior Court

Kym Chank, *Co-Chair*
Training & Certification Committee
Riverside Superior Court

Strategic Plan Moderator:

Ross Hutchings, *CCA Executive Director*
Association Resource Center (ARC)

Rachel Myers, *CCA Admin. Assistant*
Association Resource Center (ARC)

2016 Strategic Planning Committee

Tanya Rivero, *President*
Ventura Superior Court

Lorraine Benavides, *Vice President*
Ventura Superior Court

Michelle Baldwin, *Vice President*
Riverside Superior Court

Tina Dabbas, *Secretary*
San Bernardino Superior Court

James Feenan, *Treasurer*
Santa Clara Superior Court

Alicia Fletes, *Past President*
San Diego Superior Court

Brenda Lussier, *Chair*
Bylaws Committee
Riverside Superior Court (*Ret.*)

Scott Brown, *Chair*
Legislation Committee
San Diego Superior Court

Cindy Maynard, *Co-Chair*
Training & Certification Committee
Riverside Superior Court

Maria Turner, *Co-Chair*
Training & Certification Committee
San Diego Superior Court (*Ret.*)

Strategic Plan Moderator:

Debbe Dreher, *President/CEO*
Association Resource Center (ARC)

Rachel Myers, *Admin. Assistant*
Association Resource Center (ARC)