



2022 Strategic Planning Report

for



October 2022

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Background

This report represents the review, discussion, and compilation of strategic goals and objectives for the 2023 Strategic Plan (SP) for AAFPE conducted in October 2022 by Dave Wenhold, CAE, PLC of the Kautter Wenhold Management Group (KWMG).

The SP resulted from the AAFPE Board of Directors' review of short-term goals and objectives and association-specific strategic planning articles as well as identifying activities that remain relevant for the upcoming one to two years. Additionally, new strategic priorities were identified through information gathered during an in-person planning session in Orlando.

The 2023 SP is meant to be a living and dynamic document that serves as a guide for the organization and volunteer leaders in providing targeted benefits for the membership of the organization. The plan's actionable items better position AAFPE to continue to provide superior membership value through enhanced member communications, education, and organizational efficiencies.

In support of commonly accepted practices in the nonprofit community, KWMG firmly believes 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 (one to two years). Creating longer-term strategies and tactics may be untenable due to unforeseeable socio-economic changes. The quick onset of how COVID affected associations in 2020 is a clear example of the need for associations to be nimble. KWMG encourages AAFPE to continually conduct an environmental scan to "keep its finger on the pulse" of the profession, member needs, and the industry at large to ensure that the SP priorities remain relevant.

Fortunately, AAFPE is led by a high-functioning, passionate, and dedicated volunteer Board of Directors. The action items identified by the AAFPE Board will allow the association to ascend to the next level of its organizational growth. Since the beginning of our partnership with AAFPE, 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 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 his/her areas of responsibility within the SP will also dictate success or failure of the overall plan. In short, the plan is only as strong as each individual's commitment to its success.

Methodology

To better identify areas of focus for the creation of the strategic plan, the Board participated in a series of interactive strategic planning exercises.

It was the consensus among that AAFPE in the “old age” phase of the organizational life cycle model—where AAFPE must choose between going backwards to a place of success or pushing forward and reinventing itself. A “speed” SWOT generated potential ideas that might be the focus of AAFPE’s strategic efforts over the next one to two years:

Strategic Plan SWOT

<p><u>Strengths</u></p> <ul style="list-style-type: none"> Listserv Networking Conference ERL Life balance Community Shared experiences Willingness to share ideas Kindness Innovation Mentorship Opportunities for professional growth Presenting at conference Professional development LEX Commitment Respect Different viewpoint - one voice Leadership Welcoming Validations as to why we do what we do Conference 	<p><u>Weaknesses</u></p> <ul style="list-style-type: none"> Financial Communication to our membership Too many lawyers in profession, need more paralegals ERL is under utilized Volunteer Board Transfer listserv to ERL Technology – livestream, app Website Marketing Membership Outreach Vendor relationships Cost of membership Identity – Who are we? Paralegal Programs – Diminishing Some people are excluded from the organizations ABA? Terms of the Board – too much turnover in the near future Role of regional directors needs to be updated – not clearly defined
<p><u>Opportunities</u></p> <ul style="list-style-type: none"> Paralegals Going outside the paralegal programs Expanding roles – e-discovery Highlight what works well online vs. in-person and show in conference base content Non program directors How can we help our members’ presence in the market? Access to justice Conference locations – it is a seller’s market Use of campus for conference 	<p><u>Threats</u></p> <ul style="list-style-type: none"> Program closures Enrollment in school – losing students Losing members Online learning Committee organization Law schools Apathy to association membership Burnout Teaching online – competing with each other Value in education Mental health of students Strong job market (Paralegal job without education)

To prioritize the ideas generated, Board members were given a number of votes to allocate across the issues in any manner they deemed appropriate. Issues receiving the most votes were selected for the creation of strategies and tactics for full implementation.

2023 Strategic Plan Overview

KWVG believes in providing strategic planning facilitation which results in actionable items that are clear, concise, and tangible.

We also recognize that AAFPE volunteers have complex, full-time careers, which can limit participation and attendance at board activities. With the information gathered during an interactive strategic planning exercise, we were able to identify priorities that align with the mission of the organization, which were narrowed to three areas of concentration that the Board will focus on in this SP, listed below in order of importance:

1. **Communications Plan**
2. **Membership Needs Assessment**
3. **Board Make up**

The AAFPE Board then began fleshing out the three strategic goals (to include specific tasks) that need to be accomplished to address these three areas of concentration.

For planning purposes,

- *Strategic Goal:* What will be accomplished
- *Action Steps:* Specific tasks needed to complete the goal
- *Prioritization:* High, Medium, Low
- *Responsibility:* Board or committee member responsible for action steps

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

2023 Strategic Plan Action Items

Below are the overarching three strategic priorities for the AAFPE Board of Directors.

1. **Conduct a Member Needs Assessment**
2. **Create a Forward-Thinking Communications Plan**
3. **Revamp Board Structure**

Strategic Goal:

Conduct a Member Needs Assessment

Action Steps:

AAfPE will survey its membership to better understand their wants, needs and expectations from AAFPE.

1. Form a task force to lead survey efforts.
2. Design survey and secure Board approval.
3. Develop survey communication that explains the purpose of the survey and why members should participate.
4. Deploy survey.
5. Analyze survey results.
6. Draft a white paper that communicates results and disseminate to membership.
7. Utilize results to determine future strategic action items.

Timeline:

1. DONE (Led by Bill McSorley)
2. DONE
3. In process – To be completed by December 12
4. January 19
5. February 13 – March 13
6. March 13
7. Post 2023 Virtual Spring Conference

Responsibility:

1. Board of Directors
2. Bill McSorley/Task Force/HQ
3. Bill McSorley/Task Force
4. HQ
5. Bill McSorley/Task Force/HQ
6. Bill McSorley/HQ
7. Board of Directors

Prioritization:

High

Strategic Goal:

Create a Forward-Thinking Communications Plan

Action Steps:

Develop and implement a plan that highlights member benefits and the collective knowledge/information-sharing resources which will provide key, pertinent and timely information to members. The goal is to make AAFPE the “go-to” resource and preferred association for those in the profession of paralegal and legal studies education.

1. Determine specific communications goals and timelines, tentatively to include a road map for new members.
2. Establish communications policies.
3. Develop a comprehensive communications plan to meet those goals and ensure regular communication over the course of the membership year.
4. Refresh AAFPE website.

Timeline:

1. February 6
2. February 13
3. March 6/Ongoing
4. March 22

Responsibility:

1. Communications Committee
2. Board of Directors
3. Communications Committee
4. Communications Committee/Board of Directors/HQ

Prioritization:

High

Strategic Goal:

Revamp Board Structure

Action Steps:

Review/revise AAFPE mission statement to ensure alignment with member feedback, which would include potentially adjusting the structure of the Board of Directors.

1. Review results of member needs assessment.
2. Conduct focus groups to obtain member feedback regarding AAFPE's mission.
3. Evaluate need for changes to board structure, for example, assigning additional responsibilities to board seats or members (Vendor Relations, Communications and Social Media, Conferences, Committees, Professional Development).
4. Create a succession plan for current Board and committee members to identify next generation of leaders.
5. Develop Board onboarding process and orientation for new members of committees/Board.

Timeline:

1. February 13 - March 13
2. March 29 - 31 (Training: January/February)
3. April
4. May/June
5. July/August

Responsibility:

1. Board/HQ
2. Board members
3. Board/HQ
4. Board
5. Board/HQ

Prioritization:

Medium/low

Below are other areas that AAFPE discussed and considered but did not gain consensus on as top priorities during the planning meeting. These areas might be worth reconsideration in the future.

- Reconsidering conference format and mode
- Building community
- Focusing on revenue generation

Conclusion

AAFPE is very fortunate in many circumstances. It has a caring and forward-thinking Board and a knowledgeable and committed staff, and it survived the pandemic better than most associations. KWMG has done over two dozen strategic plans in the past four years for different groups. Based on that experience, if AAFPE can successfully implement many of the tasks identified in the SP, it will be a great leap forward in the members' return on their investment as well as the time spent by the Board to create this plan.

Kautter Wenhold Management Group is honored to work with such dedicated and hard-working volunteers. We understand that the organization is charging ahead and working on increasing member value, thanks to the passion and dedication by the volunteer leadership. Through our collaboration with AAFPE leaders, with implementation of many of the recommendations in the strategic plan, the association will enhance its organizational effectiveness, long-term sustainability and increase member satisfaction. We recommend that the AAFPE Board of Directors reviews progress on the SP at six, nine, 12 and 18-month intervals to ensure implementation as well as affirm that the strategic plan itself remains meaningful.