

The Resource

For Great Programs

Visit us on the Web at www.GreatPrograms.Org

Thanks for your interest in the workshop on Legal Needs Assessment & Strategic Marketing in Civil Justice Programs.

The workshop program and registration form are enclosed. We'd love to have you or one of your colleagues attend. This workshop is all new, so if you've been to one of our Traverse City workshops before, you will find many new tools to apply to your program or project.

This is going to be a breakthrough event, bringing the latest work on strategic marketing in the civil justice community to bear on three simple yet powerful questions: What results are we seeking in our work? Who, in addition to our immediate clients, has a potential stake in our success? How do we transform these audiences into *partners* and thereby expand the resources we can deploy in producing the results we are after?

Note that you can save money by registering early (up to our August 21 "early registration" deadline). Save additional dollars by booking your airline tickets early and including a Saturday night stay-over. There's lots to see and do in and around Traverse City; it is a great small town and the hub of the one of the country's favorite resort destinations. We will be organizing two "field trips" for those who wish to stay over -- a winery tour and a float trip on the Crystal River -- on the Thursday afternoon following the workshop.

If you'd like to discuss this further, please feel free to call me at (231) 947-3280 or e-mail me at ken@greatprograms.org. More information about the workshop and the conference site on Grand Traverse Bay is available on our web site at www.GreatPrograms.org.

Best,



Ken Smith

The Resource

539 East Eighth Street • Traverse City, MI 49686
Phone: (231) 947-3280 • Fax: (231) 947-5734

Five Reasons
You Should Attend the
Performance Driven Management Workshops in Traverse City

1. *Spend 1-1/2 days sharing ideas with people who share your passion for expanding access to justice.*
2. *Bring back new perspectives on improving and growing your program.*
3. *Learn how to tell your program's "story" in a more powerful way.*
4. *Invest in your own professional development.*
5. *Connect with some new people... and a whole new way of looking at your work.*

Six Reasons
You Should Send **Your Staff**
To Attend

1. *See reasons 1-5 above.*
2. *Provide powerful tools they can bring back and share with the whole program.*
3. *Connect them into a network of people across the country who are doing breakthrough work in program assessment... outcomes measurement... strategic marketing... action team leadership*
4. *Expose them to new ways of thinking about legal services delivery, management and leadership.*
5. *Invest in the professional development of your best people.*
6. *Reinforce creativity... initiative... dedication to your Equal Justice agenda.*

*For program details, site information and registration materials,
visit our web site at*

www.GreatPrograms.Org

or contact Kay Smith at (231) 947-3280

E-mail: kay@greatprograms.org

IOLTA *Information Services*

The Resource *for Great Programs, Inc.*

Announces a workshop on . . .

Performance-Driven Management: Legal Needs Assessment & Strategic Marketing in Civil Justice Programs



**September 23-25, 2004
The Bayshore Resort
Traverse City, Michigan**

Every Program or Project Can Benefit by Applying a Strategic Marketing Approach in its Resource Development Efforts.

This workshop will address three questions: How do we identify the priority legal needs of clients that drive our work? How do we translate those into powerful strategic initiatives that will make a difference in clients' lives? How do we enroll potential funders and partners to make those projects a reality?

Every program or project leader can benefit by applying a more strategic approach in his or her resource development efforts. In this workshop, 8-20 civil justice professionals will apply the tools of "Strategic Marketing" to the specific situation of their programs and projects, beginning with the process of legal needs assessment and winding up with the design of strategic marketing campaigns for launching fundable projects.

The Resource has developed an affordable, results-driven approach to legal needs assessment.

An effective needs assessment provides critical input for civil justice programs, informing a broad array of strategic decisions about program management and resource deployment - from the types of services that are provided, to case acceptance priorities, to the development and implementation of new projects and partnerships to meet changing needs in the client population.

A well-designed needs assessment will engage the full range of program stakeholders, including the client community, partner organizations, the private bar, the judiciary, government agencies, and the program's own staff and board. The workshop will show how, using a combination of focus groups, facilitated work sessions and analysis of already-existing needs survey and population data, your program can gain the insights, feedback, and direction provided by this powerful tool.

Strategic Marketing is the process of linking the interests of potential funders with the results your program is seeking to produce for clients. A legal needs assessment should flow directly into the design of strategic initiatives for meeting the needs that have been identified, and from there into the marketing efforts that are needed to generate the required resources. This workshop will bring you quickly up the learning curve on Strategic Marketing models being used successfully in civil justice programs, then give you opportunities to apply these tools, with the help of expert workshop leaders, to the specific challenges and opportunities you face in your work. You will learn from leaders and other participants how to apply a Strategic Marketing approach to dramatically expand funding for your program or project.

You should attend if you are . . .

- **An executive director or project coordinator** seeking to use the legal needs assessment process as a powerful strategic tool for addressing the needs of clients, in addition to meeting the requirements imposed by your funding sources.
- **A resource development professional** seeking ways to apply the concepts of Strategic Marketing to dramatically expand grant funding and/or development campaign success in today's highly competitive environment
- **A participant in an Access-to-Justice group** seeking to understand how a legal needs assessment and the tools of Strategic Marketing can be used to expand resources and support for civil justice in your state.

Dates to Remember

- **August 23:** Early register-by-fax discount deadline
- **September 14:** Hotel reservations due at the Bayshore Resort
- **September 9:** Last day for 14-day excursion air fare
- **September 23:** Evening reception for arriving participants
- **September 25:** Afternoon "field trips" -- winery tour or Crystal River float trip -- for people staying over after the workshop.

Agenda-At-a-Glance

Thursday, Sept 23

Afternoon
5:00-7:00 pm *Travel to Traverse City
Reception & registration*

Friday, Sept 24

8:00 am *Continental breakfast*
9:00-10:00 am *What results are we seeking in our
resource development efforts?*

Exploration of projects and marketing goals brought to the workshop by participants; agenda-setting for what we want to achieve in the workshop.

10:00-Noon *Intro to strategic marketing.* A review of the state-of-the-art of non-profit marketing, with 3-4 case examples from civil justice programs illustrating how it has been applied with dramatic results. Client needs assessments and focus groups. Outcomes-based and performance-driven marketing.

Noon-1:30 pm *Lunch break*
1:30-5:00 pm *How can we double our results?*
Hands-on, "peer consulting" exploration of how the strategies outlined in the morning can be applied to the projects and programs in which participants are involved.

6:00 - 7:00 pm *Meet for Dinner Outing*

Saturday, Sept 25

7:30 am *Continental breakfast*
8:30-10:45 am *Performance-Driven
Marketing: A Strategic
Scorecard for optimizing
performance on the results we
have chosen. Use of a
performance-driven marketing
approach to improve results
and grow our programs and
projects.*

10:45 - 12 noon *Application.* How we will apply the things we've learned to dramatically improve performance and expand funding for our projects back home.

12:00 Noon *Workshop adjourns*

Afternoon - Optional guided field trips for those staying over:

- Leelanau County Winery Tour
- Float trip on the Crystal River

Workshop Leaders

Ken Smith, President of *The Resource*, has over 20 years' experience in the design and application of outcome measures for civil justice programs, including the IOLTA reporting systems currently in place in New York, Florida, Virginia, Texas, Pennsylvania and several other states, and the Matters Statistical Report (MSR) recently implemented by the Legal Services Corporation. For the past decade he has developed innovative ways of applying outcomes and service information for telling the compelling story of how legal aid programs change lives and benefit communities.

Alex Gulotta, Executive Director of the Legal Aid Justice Center in Virginia, has led a successful \$2 million capital campaign in which the program's donor base grew from a handful to over a thousand in just three years. In addition, he has been extraordinarily successful in securing funding for service delivery projects with the result that his totally non-federally funded program has

grown to more than \$2 million in annual funding while earning widespread respect as a high quality, hard-hitting law firm for the poor.

The Conference Site

The Bayshore Resort is located on the beach in Traverse City, a gem of a small town located on Grand Traverse Bay on northern Lake Michigan. It is at the hub of a five-county resort area that boasts some of the Great Lakes' finest beaches, walking trails, nature reserves, golf courses and a National Park. The workshop site is within a ten-minute walk of downtown shops and restaurants, parks, marinas, libraries, galleries, museums and a college. The greater Grand Traverse Region is known as "The Cherry Capital of the World," the nation's largest exporter of tart cherries as well as a leading producer of apples, peaches, big fish and award-winning wines.

Logistical Information

Accommodations

The Bayshore Resort (conference site) is a beachfront hotel on Grand Traverse Bay of Lake Michigan. It is fully equipped with beach access, indoor pool, Jacuzzi, exercise room, game room and other amenities. A block of rooms at special conference rates is being held until September 14. **Participants must make their own reservations by calling (800) 634-4401.** Lodging prices at the Bayshore Resort vary from \$79-\$126 for a standard room to \$106-\$155 for a full-Bay-view room. *All rates are plus tax (eight percent).*

The Bayshore Resort is an all-non-smoking facility. Smoking rooms are available at the Holiday Inn, located within a five minute walk from the conference site (phone 800-888-8020).

Air travel

Northwest, American and United Airlines provide good connections to Traverse City with comfortable jet and large-propjet service, connecting through Detroit and Chicago. With 14-day advance reservations and a stay-over on Saturday night your fare will likely be within a \$350-500 range.

Local transportation

The Bayshore Resort will supply free shuttle service from Traverse City Cherry Capital Airport. You will not need a car during the workshop — restaurants, shops and recreational facilities are within easy walking distance. Car rentals from Hertz, National, and Budget are available at the airport if you wish to do further sight-seeing while in the area.

Fun

A wine-and-cheese reception is scheduled for Tuesday evening to greet you as you arrive and register. *A group dinner* is scheduled for Wednesday evening at one of the local gathering spots that make Traverse City a regional favorite for visitors — cost will be \$15-30. You are also encouraged to stay over after the workshop and explore the Grand Traverse region's many cultural, scenic and recreational attractions. We will provide restaurant lists and schedules of local events, and depending on interest, will lead two optional "field trips" on Saturday afternoon: a tour of some of the award-winning *Leelanau County wineries* or a float trip on the beautiful *Crystal River* in the Sleeping Bear Dunes National lakeshore.

Conference fees and registration

The table below indicates fees for different categories of registration. Fees include continental breakfast on both days. Other meals are on your own at nearby restaurants, which are close by and economical (\$6-15 breakfast & lunch; \$10-30 dinner).

	Early Registration Through Aug 23	Regular Registration Aug 24- Sept 23
First person from an organization	\$350	\$495
Each additional person	\$295	\$395
User group discount (current clients of The Resource)	\$75	\$50

Send Your Registration Today and Save!

Submit the Registration Form enclosed with this program or contact *The Resource* to have one faxed or e-mailed to you. Register early — you will save money and ensure a space at the workshop. To ensure quality, the workshop will be limited to 20 participants.

For Further Information, Contact:

Kay Smith, Vice-President
The Resource
539 East Eighth Street
Traverse City, MI 49686
Phone (231) 947-3280
Fax (231) 947-5734
e-mail: kay@greatprograms.org

Registration Form

Strategic Marketing Workshop

Bayshore Resort, Traverse City, MI ~ September 23-25, 2004

Please register early - workshops will be limited to 20 participants.

How to Register

- 1) Complete the form and send check payable to "The Resource" to 539 E. Eighth Street, Traverse City, MI 49686, ATTN Kay Smith.
- 2) Inquiries regarding registration can be directed to Kay by phone: 231-947-3280, by fax: 231-947-5734, or by e-mail: kay@greatprograms.org

Cancellation and Refund

Workshop registration cancellations received by September 9, 2004 will be refunded in full. After then, registration fees are non-refundable but may be transferred to another workshop of your choice.

Personal Information

Name _____
 Title _____
 Organization _____
 Address _____ STE _____
 City _____ State _____ Zip _____
 Phone _____ Fax _____
 e-mail _____

Registration Fee Enclosed

<i>Circle all that apply.</i>	Early Registration Through Aug 21	Regular Registration Aug 22-Sept 23
First person from an organization each workshop	\$350	\$495
Each additional person each workshop	\$295	\$395
User group discount (current clients of The Resource)	\$75	\$50

Total Enclosed: \$ _____

Hotel Reservations

The workshops will be held at the Bayshore Resort in Traverse City. Please call to make your room reservation. There are three types of rooms to choose from with the following cost (*preliminary*):

Weekdays (Sun-Thur)	Weekends (Fri-Sat)
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Standard	\$79	\$126
Partial View*	\$88	\$135
Full View*	\$106	\$155

*View indicates a view of Grand Traverse Bay from each room.

All rates are plus tax (8%).

Please act quickly to arrange airline tickets as flights fill and prices increase. The major airlines that service Traverse City are Northwest, American and United.

The Bayshore Resort will supply free shuttle service (5-minute ride) from the airport or you can take a cab upon your arrival.

The Bayshore can be reached at **(800) 634-4401**.

Cutoff date for guaranteeing special conference rates is September 16, 2004.

Be sure to inform the reservation agent that you are with The Resource Workshop in order to secure the above rates. ***This facility is COMPLETELY non-smoking.*** For smoking accommodations, we can refer you to area Hotels and Motels.

Guests of the Bayshore Resort will receive a complimentary breakfast (waffles, sausage, omelettes, breakfast breads, muffins, bagels/cream cheese, fresh whole/cut fruit, yogurt, assorted cereals, donuts, danish, coffee, tea, milk, juice).

All other meals will be at area restaurants (not included in conference fees).