



# STRATEGIC PLAN

JUNE 2023 – MAY 2028

APPROVED APRIL 2023

LEARN MORE AT  
[WWW.NAELA.ORG](http://WWW.NAELA.ORG)



## OUR VISION

We envision a day when all older adults, people with disabilities, and their families have the legal, health, social, and financial care they need to live their best lives.

NAELA will shape, support, and inspire the national legal community.



## OUR MISSION

We equip attorneys for the complexity of serving older adults, people with disabilities, and their families through education, advocacy, and community.



# OUR KEY ISSUES

NAELA engages its members by creating internal and external opportunities to enhance their practices and to provide a community for elder and special needs law attorneys.



NAELA promotes the value of elder and special needs law attorneys to the public and ensures its members are equipped to advocate for the quality of life sought by older adults and people with disabilities in a changing environment.

NAELA serves as the thought leader in elder and special needs law for members, policymakers, academics, judges, others in the legal community, and related professions through the voice of its members.

# GOALS: Our Milestones and Landmarks



**Engage** attorneys in their communities to promote mutual value between national NAELA and local interactions in support of a common vision.

**Engage**

**Develop**

**Develop** holistic and collaborative partnerships to enhance the practitioner's ability to better serve older adults, people with disabilities, and their families.

**Expand** the reach, voice, and reputation of NAELA and its members through aging- and disability-focused programs and publications.

**Expand**

**Build**

**Build** opportunities to attract prospective members and retain current members.

# TACTICS: How We Achieve Engagement

NAELA engages its members by creating internal and external opportunities to enhance their practices and to provide a community for elder and special needs law attorneys.



**Build** opportunities to attract prospective members and retain current members.

- ✓ Build far-reaching/wide-ranging opportunities for prospective members to hear about, engage with and join NAELA.
- ✓ Create and expand programs that focus on peer-to-peer learning and engagement.
- ✓ Enhance communication and collaboration among national NAELA and States (including formal state Chapters).
- ✓ Identify the various stages of membership, including how each membership type engages with NAELA, and communicate this information to the membership.



**Expand** the reach, voice, and reputation of NAELA and its members through aging- and disability-focused programs and publications.

- ✓ Create a broader pool of authors and presenters that celebrates unique and different voices and perspectives.
- ✓ Identify opportunities and remove barriers to presenting and writing.
- ✓ Consider new and alternative communication strategies to deliver education.
- ✓ Facilitate student and transitioning attorney engagement with NAELA programs and publications.



**Engage** attorneys in their communities to promote mutual value between national NAELA and local interactions in support of a common vision.

- ✓ Communicate and promote national NAELA's ability to provide operational support to State chapters.
- ✓ Nurture diversity, equity, inclusion, and belonging within NAELA.
- ✓ Continue to enhance collaboration in advocacy efforts at the state level.
- ✓ Enhance engagement opportunities and support for members without a formal chapter.
- ✓ Explore the development of new state and regional chapters.



**Develop** holistic and collaborative partnerships to enhance the practitioner's ability to better serve older adults, people with disabilities, and their families.

- ✓ Track trends in practice and related fields.
  - ✓ Share knowledge and expertise with other professionals in aging, disability, finance, healthcare, and advocacy.
  - ✓ Draw on the knowledge and experience of the clients NAELA members serve.
  - ✓ Apply a person-centered approach to NAELA endeavors.

# GOALS: Our Milestones and Landmarks



**Increase** the capacity of State chapters to help local NAELA members respond to the broad spectrum of needs facing older adults, people with disabilities, and their families.

**Improve** NAELA members' practices.

**Improve**

**Ensure**

**Ensure** that NAELA can nimbly respond to a changing health and social policy landscape.

**Communicate**

**Communicate** how elder and special needs law attorneys help clients achieve the quality of life and future they seek.



# TACTICS: How We Achieve Relevance

*NAELA promotes the value of elder and special needs law attorneys to the public and ensures its members are equipped to advocate for the quality of life sought by older adults and people with disabilities in a changing environment.*



**Communicate** how elder and special needs law attorneys help clients achieve the quality of life and future they seek.

- ✓ Offer information across a variety of platforms to communicate the value of using an elder or special needs law attorney.
- ✓ Provide tools and education designed to increase the capacity of NAELA members to communicate the value of elder and special needs law services.
- ✓ Enhance the recognition of the NAELA brand as an indication of the apparent value of elder and special needs law services with prospective clients and non-NAELA audiences.



**Increase** the capacity of State chapters to help local NAELA members respond to the broad spectrum of needs facing older adults, people with disabilities, and their families.

- ✓ Study and assess the relationship among state Chapters, non-Chapter states, and national NAELA.
- ✓ Establish and engage in activities that strengthen the relationship between state Chapters and national NAELA.
- ✓ Build partnerships with state Bar associations and other law-related organizations.
- ✓ Initiate partnerships to enhance educational offerings such as *NAELA Journal*.



**Improve** NAELA members' practices.

- ✓ Direct members to innovative practice management tools.
- ✓ Coordinate strategic partnerships to help members develop innovative practice models.
- ✓ Develop additional education such as case studies, business models, coaching, and other tools to enhance members' practices.



**Ensure** that NAELA can nimbly respond to a changing health and social policy landscape.

- ✓ Develop strategic alliances to expand NAELA's reach.
- ✓ Educate NAELA members on the policy issues that will impact NAELA's advocacy positions.
- ✓ Cultivate member consensus on policy topics relevant to the practice of elder and special needs law.

# GOALS: Our Milestones and Landmarks



**Create** a leadership pipeline through State chapters.



**Expand** NAELA's thought leadership through strategic alliances.



**Promote** NAELA's expertise in elder and special needs law to members, policymakers, academics, judges, others in the legal community, and related professionals.

**Advocate** for alternatives to institutionalization, such as expanding home- and community-based services through legislative, regulatory, and other means.



**Educate** NAELA members on strategies to advance the self-sufficiency and independence of older adults and people with disabilities.



# TACTICS: How We Achieve Leadership

NAELA serves as the thought leader in elder and special needs law for members, policymakers, academics, judges, others in the legal community, and related professions through the voice of its members.



**Educate** NAELA members on strategies to advance the self-sufficiency and independence of older adults and people with disabilities.

- ✓ Encourage NAELA members to undertake a holistic, person-centered view of client options.
- ✓ Train NAELA members on developing strategies to work with clients with disabilities or age-related challenges.
- ✓ Provide NAELA members with up-to-date information on trends in practice, legislation, and regulation.

**Advocate** for alternatives to institutionalization, such as expanding home- and community-based services through legislative, regulatory, and other means.

- ✓ Promote policy change through litigation, regulation, and legislation.
- ✓ Increase collaboration with allied organizations to achieve a shared vision of a society where older adults and people with disabilities can remain successfully in the community.
- ✓ Advocate for the least-restrictive alternatives for those that NAELA members serve.

**Promote** NAELA's expertise in elder and special needs law to members, policymakers, academics, judges, others in the legal community, and related professionals.

- ✓ Communicate the extent of NAELA's educational resources, including virtual, and in-person training to external stakeholders.
- ✓ Support the depth and breadth of member expertise through ongoing educational opportunities, such as publications, virtual learning, and in-person meetings.
- ✓ Promote the field of elder law and special needs planning as valuable and necessary.

**Create** a leadership pipeline through State chapters.

- ✓ Develop a leadership training program for the Board and staff of State chapters.\*
- ✓ Invest in State chapters through joint programming and advocacy efforts.
- ✓ Pilot regional programs to strengthen state Chapters and potentially launch new Chapters in states without a NAELA presence.

**Expand** NAELA's thought leadership through strategic alliances.

- ✓ Develop training for NAELA members to enhance their skills and confidence when representing NAELA with other organizations.
- ✓ Nominate NAELA members to serve on national advisory boards, research studies, initiatives, and other leadership initiatives in the aging, disability, and healthcare community.
- ✓ Promote NAELA's thought leadership to institutions of higher learning such as universities, research institutions, and think tanks.

# Acknowledgements

The National Academy of Elder Law Attorneys (NAELA) proudly presents its 2023 – 2028 Strategic Plan. This report was made possible through the more than 4,200 elder and disability law attorneys in NAELA’s membership who provided financial support through annual dues, survey insight, and countless hours of *pro bono* volunteer service to develop this plan. Thank you.



In addition to the volunteers listed below, NAELA would like to thank Michael J. Amoruso, Fellow, CAP, for his leadership in launching the 2022-23 strategic planning process, planning facilitators Steve Swafford, PhD and Jill McCrory, DMin of Leadership Outfitters, LLC, and data scientist Kevin Whorton, MA, of Whorton Research who conducted the national survey and data analysis.

## 2022 – 2023 Board of Directors

Roberta K. Flowers, Fellow, President  
 Bridget O'Brien Swartz, Vice President  
 Judith M. Flynn, CELA, Treasurer  
 Eric J. Einhart, Secretary  
 Letha Sgritta McDowell, CELA, CAP,  
 Immediate Past President  
 Barbara Boone McGinnis, CELA  
 Brenna M. Galvin  
 Caleb S. Lihn  
 Christopher M. McCarthy, CELA, CAP

Donna J. Jackson  
 Heather Voorn, CELA, CAP  
 Lauren Marinaro  
 Marielle F. Hazen, CELA  
 Mark T. Johnson, CELA  
 Paul D. Shapiro, CELA  
 S. Clinton Nix  
 Scott B. Silverberg  
 Shari Polur

## Committee Leadership

Chair, Letha Sgritta McDowell, CELA, CAP  
 Board President, Roberta “Bobbi” K. Flowers, Fellow

## Committee Members

A. Frank Johns, CELA, Fellow  
 Andrew R. Boyer  
 Beth A. McDaniel, CELA  
 Blaine P. Brockman  
 Brenna M. Galvin  
 Bridget O'Brien Swartz  
 Bryan Adler, CELA  
 Judith M. Flynn, CELA  
 Maureen D. Lester  
 Rebecca C. Morgan, CAP, Fellow  
 Shari Polur  
 Stuart D. Zimring, CAP, Fellow

## Project Staff

Project Director, C. Grace Whiting, JD, Chief Executive Officer, NAELA  
 Kirsten Brown Simpson, Chief Operating Officer, NAELA  
 Gregory Manora, Director of the Executive Office, NAELA