

CHAPTER 6: DEVELOPING THE LONG RANGE PLAN

A. Program Description

Any organization, whether a for-profit business or a non-profit professional association, is created to achieve specific goals. As the organization and the environment in which it finds itself change over the years, those goals may change or need to be changed. Long range planning is a process through which an organization can examine itself and its environment to ensure that it continues to be relevant.

By systematically determining both its internal needs and the needs of those it serves, as well as available financial and manpower resources, long-range planning enables an organization to make conscious and informed decisions about the broad goals of the organization and the narrower objectives that, if achieved, will result in the goals being met. It is a vital process for any organization because, once done, the long-range plan provides the organization with a philosophical framework. This framework provides continuity and direction and allows the organization to make rational decisions regarding the distribution of scarce resources.

Long-range planning is critical for bar organizations. Because bar organizations experience rapid turnover in voluntary leadership positions, long-range planning provides the only means of insuring that the organization neither “reinvents the wheel” every year nor fritters away its resources by skipping from one emphasis to another, never accomplishing anything of lasting value. Further, if done properly, long-range planning will strengthen an organization by helping it meet more of the needs of its membership and the broader community it serves. As a result of meeting those needs, the organization will garner more support, more members, more volunteers, and a better image for the bar.

B. Needs Assessment

The first stage in developing a long-range plan is a needs assessment to determine the needs of your bar association and your community. Remember at all times that the point of doing a needs assessment is to determine what your young lawyer organization should be doing in today’s environment.

1. What to Assess

As a general matter, your assessment should inquire not just into current needs, but rather also seek to identify needs and issues that are expected to emerge over the next five years (at which point in time you should conduct another needs assessments). The areas to assess fall into two broad categories: the environment in which the bar organization operates and the bar organization itself. The section that follows suggests a possible general outline for carrying out your needs assessment. It does not attempt to be exhaustive.

a. Your Environment

Since the general purpose of any bar organization is to serve the profession and the public, it is necessary for your organization to assess the needs of the profession and the public (your environment) in order to fulfill your underlying purpose.

As you assess your environment, make sure that you not only identify what the needs are, but also who is already doing what to address these needs. This is critical in determining whether, on balance, the resources of the bar are more needed in one area or another.

(i) The Justice System: There are obviously many potential issues that arise within this area. Two issues with which young lawyer groups might be particularly concerned with involve access to the system by disadvantaged or underserved elements of the population including, among others, the poor, effectiveness of the system.

(ii) The State of the Profession: This area can be further divided into two sub-areas: 1) entry into the profession; and 2) the practice of law. In looking at entry issues, your inquiry should include issues of concern to undergraduates, such as pre-law counseling and law school minority recruitment, in addition to the concerns of law students. Issues concerning the practice of law can be divided into three further sub-areas: career issues, professionalism/ethics, and law office management.

(iii) Your Community/The Public: It is impossible here to even begin to list the potential issues that run the gamut from “social” problems, to economic development issues, to voter participation, to alienation from the legal system, just to name a few. They can, however, be divided into two basic sub-areas: the needs of the community and the image of the profession within the community.

b. Your Bar Organization

In conducting your organizational assessment, you will find it helpful to trace the development of your organization in addition to looking at its current status and future development. Getting information about its history is frequently necessary to understand current organization politics and policies.

(i) The Senior Bar: In looking at your senior bar as part of the needs assessment, there are two important questions to address. The first is: how does the senior bar view the purpose of your young lawyer organization; what is its attitude? If the attitude is not very positive, why isn't it? Getting an accurate reading on such questions will be critical in determining whether one of your important needs is to improve your relationship with the senior bar and how you can achieve that goal. The second question is: what are the projects and programs that the senior bar undertakes? This is critical both because the senior bar may already be addressing a need you identify and therefore you can devote your resources to other needs, and also because you want to avoid political problems, *i.e.*, turf battles, unless you knowingly enter into such a situation with a specific purpose in mind.

(ii) The Young Lawyer Section: Here you will want to assess your organizational strengths and weaknesses, your threats and opportunities. For example, a small volunteer base would be an obvious weakness, while a threat might be an upcoming discussion on converting your YLS to a separate dues-paying membership status.

One of the most important points in thinking about this area is to raise basic questions about your organization's structure. Do not assume that the existing structure is sacrosanct or that there isn't a better structure for the organization. For example, perhaps the governing board of a state organization should be composed of representatives of the existing young lawyer organizations rather than individuals who are not tied into the local organizations. Also, maybe the organization would greatly improve its continuity and productivity if it created a ladder of succession by having a chair-elect position or, for more complex organizations, a three-rung ladder going from secretary to chair-elect to chair.

(iii) The YLS Membership and Non-Members: What are young lawyers' needs and interests? How do they view their careers? What do they think of public service? What do your members want to get out of their membership? What problems do non-members have with your organization?

2. How to Do a Needs Assessment

There are two basic techniques to use in doing a needs assessment: personal interviews and surveys. To the extent possible, you should rely on personal interviews because you will get richer feedback than through a mailed survey.

The extent of your needs assessment and the number of interviews conducted will depend on your available manpower and the complexity of your environment. If necessary or appropriate, an organization can conduct a needs assessment using very few resources. No matter how limited your resources or simple your environment, however, do not conduct your needs assessment by just having your Long Range Planning Committee members voice their perspectives on your environment and organization. Such a limited perspective makes it far less likely, if not impossible, for the long range planning process to strengthen your organization by identifying and then meeting more of the needs of your membership and the broader community you serve.

(a). Interviews

Interviews should be conducted with a cross-section of individuals in the justice system, the bar, and the community. If possible, do not limit your interviews to people in leadership positions. You may get quite different comments when talking to other individuals in each group. You will probably have to be selective in the various community groups on which you focus because you will not have the resources to cover all of them. In so doing, however, make sure that the groups with the greatest potential need for your organization's services are covered. For some of your assessment areas, such as YLS membership, you may want to have group interviews with selected members. Better information may be collected from such settings because the individuals in the interview session react to each other's comments.

Regardless of who is being interviewed, you will want to provide the interviewer with a list of questions for the interview. For the most part, these will be open-ended questions that elicit a response from the individual in his or her own words, rather than a multiple-choice answer. Be careful in framing your questions that you do not unintentionally limit the response. For example, if you are talking to community leaders, ask them what they see as the burning issues for them now and in the next five years as well as what they think the bar association can do to help them. If you just ask the latter, you may never learn what the real issues are and determine whether the bar can have a positive impact.

(b). Surveys

While interviews provide you with richer information because they are open-ended and provide for greater flexibility, your resources will probably restrict how random they may be. The people you interview will be carefully, but not randomly, selected. Nevertheless, as long as you make sure that you are covering a cross-section of organizations and political/social attitudes, you will obtain useful information, and you need not be concerned with a lack of statistical reliability for all areas other than membership.

With regard to membership, statistical reliability is more important and a survey is, therefore, strongly recommended. Getting an accurate reading of the needs and interests of your membership (and non-members) is absolutely critical to defining your purpose and developing your programs. If your purpose and programs do not fit the needs and interests of your potential and present membership, your programs will fail to attract the necessary volunteer base to support them, and your membership, if you are a voluntary bar, will decrease.

3. Report of Needs Assessment

The final product of your needs assessment should be a written report.

C. Developing Your Long Range Plan

Once you have completed your needs assessment, you have the information at your disposal to decide what your organization should be doing. This section will describe who should be involved in making those decisions and what specific decisions need to be made.

1. The Decision Makers

A Long Range Planning Committee should be appointed with the responsibility for conducting the needs assessment and developing the long range plan for your organization. There are several guidelines to use in appointing your Long Range Planning Committee.

* The Committee can be composed of anywhere from 3 to 15 individuals serving one year terms or staggered terms of three years. For example, if you have twelve members, then you would have three groups of four individuals with three-year terms. That means that when the Committee is

first appointed, four members would have a term of one year, four a two-year term, and four a three-year term.

* The Committee each year should be chaired by the chair-elect or next in succession after the new chair. This is very important because one function of a Long Range Planning Committee is to provide chairs-elect with an advisory think-tank to help develop their programs. The officer who chairs the Long Range Planning Committee should appoint the new members for that year.

* In selecting the members of the Committee, it is very important that they represent a cross-section of your young lawyer organization. Thus, much consideration should be given to composing the Long Range Planning Committee with some individuals in leadership positions and others who are thought to be “up and comers”; it should be a cross-section of age and experience. It should have both women and minority members. It should have various “political” perspectives represented on it. Without such a cross-section, it is less likely that you will be able to arrive at a broad-based plan. Also, depending on the political environment at the time, your Long Range Planning Committee and process may be viewed as just representing a small clique were it not representative of the greater young lawyer organization.

Typically, once the plan is formulated, it is transmitted to the governing board of the organization for formal adoption.

2. The Decisions

(a). Goals and Objectives

Given the environmental and bar organization needs and the membership interests you have identified through the needs assessment, you must first decide on the organization’s broad aspirational goals for the next five years. Second, you must decide on more narrowly drawn objectives to achieve those goals.

The goals and objectives must be a mix of the practical and the visionary. They should include sufficient items of current interest to your members and non-members to draw them into the organization. It is important, however, for you to remember that the organized bar has an obligation to lead the profession and play a leadership role in your community. Therefore, your goals and objectives must point the bar in directions that the needs assessment identifies as being critical, even though such directions may go beyond the interests of your members. The object is to have the right mix so that both aims can be achieved.

Goals can be both substantive and administrative/management oriented. For example, typical goals deal with providing public service, improving the profession, increasing membership and the involvement of members in the bar’s activities, and improving the

management and efficiency of the organization. It is important to remember, however, that while the goals should be broad statements, they should not be so general that they fail to give direction or conceal the goals.

Your goals may sound much like those of other bar associations. It is in the development of the more narrowly drawn objectives that you will reflect the details of your needs assessment as well as the other factors discussed below. The objectives may be viewed as the component parts of each goal. For example, a goal might be to improve the availability of legal services to the public, while an objective under that goal might be to increase the knowledge of and availability to the elderly of legal services addressing their problems.

(b). Strategies

Once you have established your goals and objectives, you next need to decide on the specific strategies to achieve those goals and objectives. For example, two strategies to achieve the objective relating to the elderly noted above might be: a) to establish a specialized pro bono panel on problems of the elderly; and b) to develop a senior citizen handbook which explains legal issues of concern to the elderly and then to send young lawyers to senior citizen centers to distribute the handbook, explain the points of law, and to inform the audience about the existence of this pro bono panel.

Strategies can be developed in one of two ways. They can be developed by the Long Range Planning Committee itself or as part of the yearly plans of action for your young lawyers committees. The ABA/YLD has chosen the latter route because it feels that members of specific committees, such as the Delivery of Legal Services to the Elderly, are closer to the issues and therefore better suited to develop effective strategies.

3. The Factors Affecting Goals

Nothing should negatively affect your statement of goals. These are aspirational in nature and typically provide direction for the bar rather than a specific end point. For example, goals may be stated in terms of increasing or promoting increased delivery of legal services rather than stating that every individual who needs legal services must have them. Goals should therefore not be affected by the amount of resources available.

When developing objectives and, even more importantly, strategies, a number of factors will affect your deliberations because it is important that both the objectives and strategies are practical and doable.

(a). Financial Resources

Financial resources limit what an organization can achieve. You will need to prioritize your objectives and strategies to determine which will get funding.

(b). Volunteer/Staff Resources

As with financial resources, manpower resources are finite. There are just so many projects you can undertake given a certain staffing level and membership base. With regard to volunteer manpower, however, if done properly, so long range planning may actually increase your resources by establishing activities that are of greater interest to your membership and therefore increasing your pool of volunteers.

Another important point here is that in designing your projects or strategies, it is becoming increasingly important to design them in such a way that volunteers can participate with a minimal and controllable commitment of time. As the pressures of law firms' bottom lines and increasing billable hour requirements are felt, this design component becomes central to the success of a project.

(c). The Ability to Have the Desired Impact

It is counter-productive to develop a strategy that cannot possibly work because it is designed to have a minimal impact. It will discourage volunteers, it will make you look foolish in the eyes of the senior bar, and it will discredit you in the larger community if the activity seeks to address community needs. This impacting factor goes directly to the design of a particular strategy.

(d). The Need to Involve Other Organizations

Some projects need to be coordinated with other organizations in your area, such as community groups, the local medical society, or local government agencies. In general, the need to involve other organizations should not discourage your group from pursuing a particular project unless past bad relationships make future cooperation extremely difficult when other organizations need to be involved, however, the objective or strategy should recognize this need and carefully define how that relationship is to be developed and nurtured.

(e). The Public Relations Impact

If you must decide between two objectives or strategies, both of which have similar priorities, are practical, and have no apparent negatives associated with either, you may want to consider the public relations impact of the two items. The one with greater potential favorable public relations effect should be undertaken, assuming again that they are in all other respects basically equal. If, however, you are considering two items, one having a high priority for need but low public relations impact and another with good PR potential but lower need, you should undertake the item having higher priority in terms of need.