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## American Bar Association Young Lawyers Division

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## It's a Marathon, Not a Sprint -- Long Range Bar Planning with Clarity

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## **Long Range Planning: Create a Vision For Your Bar and A Plan To Get There**

*by Daniel W. Van Horn*

Long ranging planning is something that most bar leaders know they need to do. However, because most of us are volunteers and are not paying our bills by the bar work we do, it often gets put off to another day. The purpose of this article is to convince you of the importance of creating a long range plan and provide you with a guide as to how to do so.

### **Why Is Long Range Planning Important?**

Long range planning is important in any organization because it allows you to define who you are, what you do, how you will do it and when you'll get it done.

#### **1. Continuity**

Most bar organizations (especially young lawyer affiliates) have a high degree of turn over from year to year. Without an effective long rang plan in place, your organization may fall victim to dependence upon strong leadership such that if you happen to have an especially strong and organized leader, your bar will have a great year. However, without that great leadership, you may not achieve that same level of success. Moreover, without an effective long range plan your organization may experience a high degree of change of programs, change of focus and a recurring pattern of reinventing the wheel. If you have a deep pool of volunteers and significant financial resources, those patterns may not be fatal. If not, changing programs, changing focus and constant reinvention can discourage participation and buy in.

With an effective long range plan, you'll have a multi-year plan in place. That means that programs will be carried over from year to year. There will be more institutional expertise, knowledge and experience. Your organization's focus can help create buy in from your volunteers and related groups, such as the senior bar in your state or city. Moreover, you will have much less reinvention, which means that you will need fewer financial resources and will have a far greater chance of success.

#### **2. Measuring Stick**

An effective long range plan will also provide your organization with a metric or a measuring stick by which to judge your success or failure. This is probably the biggest benefit of a long range plan. Without a mechanism by which to gauge the success or failure of your organization's goals, your organization will never move forward or achieve its stated goals. In other words, every year can be classified as a success whether it was or not. This is not a benefit to anyone. If you know that you are not meeting goals, you can amend your actions and plans to get back on course.

Creating a long range plan may be the most important thing that your organization does.

## **How Do We Create A Long Range Plan?**

### **1. Working Group.**

The first step is to create a working group to prepare the plan. Selecting the people to include in the working group is critical. The working group should include at least some of the current leadership. If you have a line of succession like the ABA-YLD does (i.e. the Secretary-Treasurer becomes the Chair-Elect and then the Chair), then you should have the head of the working group be the person who will lead your bar in two or three years.

A word of caution. If you select only those that are in leadership and use this working group as a sign that someone has "arrived" or is important, it may lead to a group dynamic that is not diverse. Those types of groups tend to reinforce whatever the prevailing thinking is. That may or may not be a good thing depending on what that thinking is. You want a group that will chart a bold future for your group - not one that will accept the status quo.

The working group should contain a diverse group of people. The idea is to create a vision for your bar. The more diverse the base of experiences to draw upon, the stronger the plan will be. You may want to include some of the prior leaders of your bar if you think they will be committed to creating a new vision for the organization. If you are concerned that they will be too married to "the way things have always been done" then don't include them. You may want to invite a member of the senior bar or of the bar's staff to be part of the group. Including them could help foster relations between your bar and the senior bar. There is no magic to who is part of this group other than the selection of its leader and making sure that the group is diverse.

### **2. Long Range Planning "Retreat"**

#### **a. Brainstorming Session**

Once you have selected a working group, the group's chair should call together a brainstorming session. The purpose of this session is to examine and dream up a vision for your organization. Consider a retreat or non-traditional setting to get away from distractions. A new environment can invite new ideas. You should also consider using a facilitator, preferably a non-member of your organization. The Affiliate Assistance Team is always willing to assist you.

During this brainstorming phase, be sure to cover the whole waterfront, considering areas of challenge and opportunity. At a minimum, the working group should discuss the following core areas: membership (recruitment, law student outreach and diversity), member services, CLE, public service, finance, operations, senior bar relations, written publications and e-communications (web site, blog, list serv, etc.). You should add other areas to this list which are important to your organization.

During this brainstorming phase, make sure the group follows a couple rules. First and foremost, no idea should be laughed at. It does not matter how outlandish the idea. You want all ideas to be laid out on the table. You'll choose among those ideas later. Second, ban phrases such as: "we've never done that before", "that won't work", "that's too expensive", "we'll never be able to get anyone to agree to that", or any similar phrase. Some of the best ideas will be ones that are "outside the box" of your current operations and thinking.

#### b. SMART Goals

After the brainstorming session, the working group should be divided into smaller groups. Each group should have a leader and a recorder. Each group will then come up with SMART goals for a specific topic/area considering the brainstormed ideas discussed during the brainstorming session.

SMART goals stand for Specific, Measurable, Assign Responsibility, Realistic and Timetable. In other words, you must know what you are going to do, you must know that it has been done, you must know who will do it, you must know that you can do it and you must know when it needs to be done.

For example, if your brainstorming idea is to increase your level of minority and female members, a SMART goal to achieve this idea may be as follows: (1) to attract at least ten new members who are a minority or a female; (2) sponsor programs with the minority student organizations at area law schools and specialty bars; (3) three people will be assigned to this task; and (4) this goal is to be achieved within two years.

#### c. Reporting

After each group has developed its SMART goals, they should prepare a report to circulate with the other members of the working group. The members should then be given time to digest the report. This period of reflection will keep your group from getting too far a field while allowing other meritorious but new ideas time to be considered.

#### d. Ranking

After you have converted all of your brainstorming ideas into SMART goals, your next step is to make some priority choices. Go through each general area and within that area rank your goals based on the timetable needed to achieve them, the financial resources available and the importance of the goal to your group's mission. After you have ranked each goal within each area, create a list of all the goals and rank them overall.

Very few bar organizations have unlimited financial resources and an unlimited amount of volunteer time. By ranking each goal, you will have a good idea what activities can and should be considered each year given your financial resources and volunteer base. By prioritizing and ranking, you can revisit your plan on an annual basis to see which goals and plans have been completed and which have not. The highest priority goals that have not been completed become your plan for the next year.

A five year period is probably the longest that you'll want to plan ahead. Any shorter and you will constantly be engaged in significant long range planning. Any longer and it will become very difficult to convert your brainstorming ideas into SMART goals.

### 3. Implementation/Approval

Once your working group has drafted a long range plan that it is comfortable with, its next job is to sell that plan to the rest of your organization. First, present the plan to your organization's executive board. Obtain their approval. Second, post the plan somewhere public, your website for example, and invite your membership to provide feedback. Few probably will. However, the mere act of giving them a voice may generate new ideas and will certainly create support for the plan. Finally, you should also present your plan to your senior bar. Showing it to them and permitting them (or at least their executive board) to comment can only help relations with them. It could also possibly lead to additional funding and support for your projects.

Do not be surprised if during this buy in process you receive requests for substantive changes from your board, your bar membership or the senior bar. Remember that the plan you are creating is a plan that has to stand the test of time (at least five years) and has to have as much support as possible to succeed. This is not your working group's plan. It is your entire organization's plan. Be open to going back to the process and starting over where needed. A good plan may take as long as a year to develop, but it is well worth it! A good long range plan may transform your organization! Finally, don't forget that the Affiliate Assistance Team can help you in this process.