Serving the Mission and Building Capacity: Strategic Planning

Elizabeth Derrico
Associate Director
ABA Division for Bar Services
elizabeth.derrico@americanbar.org
“The essence of leadership is a vision you articulate clearly and forcefully on every occasion. You can’t blow an uncertain trumpet.”

~Theodore Hesburgh
Strategic Planning & Visioning are deep cleansing breaths for the association.
It is all about direction
Prevents Association Whiplash
Failure is an option.

The EDSEL LOOK is here to stay—and 1959 cars will prove it!
Successful Strategic Planning

Context - Why
People - Who
Infrastructure - How
Inspiration - Why
Accountability - Who, What & When
Process

Inspiration Why?

People Who?

Context What?

Process How?

Formulating How?

Sustaining How?

Board
Committee Sections
Committees Members
Staff

Surveys Focus Groups
Listening Sessions
Stakeholder Interviews
Status Updates

Committee Facilitated
Event Work product
Accountability

Values Vision
Impact Measures
Success

Inspiration Process
People Accountability
Context

Accountability
Why are you planning?

- We haven’t ever taken a good long look at our organization.
- We lack focus.
- We need continuity from year-to-year.
- We’re growing.
- We’re contracting.
- We’re concerned about the future of the profession and our members.
People

Who should be on the steering group for planning?
For the Steering Committee
(some suggestions)

• President-elect or vice president
• Finance/budget position
• Young lawyer
• Committee chair or vice chair of your most important event
• Outlier
• Not the president (certain not as chair)
• Past president
What do you need to know?

- Changes in the profession
- Changes in the economics of practice
- Changes in demographics
- Changes in the courts
- Changes in the delivery of services
- Changes in technology
- Changes in the community

(or not)
Who are your stakeholders?

- Members
- Past presidents
- Solos
- Young lawyers
- Old lawyers
- Managing partners
- Section chairs
- Committee chairs
- Law firm administrators
- Bench
- Legal services providers
- Court administrators
- Court clerks
- Pro bono organizations
- Bar foundation
- Sponsors
- Legislators
- VSB and VBA
How are you going to gather the information?

- E-surveys
- Focus groups
- Breakfast, lunch or dinner
- Interviews
- Roundtable discussions
The Nitty-Gritty Questions

• Facilitated or not?
• If facilitated, by whom?
• One-day or a series of days?
• Who is going to do the actual planning?
What should be included in a strategic plan?

Vision
Goals
Strategy
Success
Action Items
Priorities
Timelines
Accountability
ACTION PLANNING
Sports Day

GOAL:
1. LAC/ES page - benefits & services
2. Assign each new lawyer a member to introduce
3. BoD calls members
4. OCBA Open House
5. Gornbein show - "OCBA Minute"
6. Recognize people at events
7. E-blasts - target practice areas committee
8. 1/2 day retreat: Chairs & Vice Chairs
9. Law students @ events
10. PR Person
11. Family oriented events
12. Settlement Day
13. Unemployed Lawyers - resume review
14. Partnership Events
15. Tables hosted by BD - assign new ppl
16. Bounty to members who recruit new
Achievement

A+
How can you ensure success?

- Building ownership
- Setting priorities
- Monitoring
- Aligning with budget
- Communicating
- Questioning

- Action planning
- Board meetings
- Champions, liaisons
- Timelines
- Leadership team
- Celebrate
PAST PERFORMANCES
WERE NO INDICATION
OF FUTURE RESULTS
Resources

- ABA Division for Bar Services [http://www.americanbar.org/groups/bar_services.html](http://www.americanbar.org/groups/bar_services.html)
- Board Link
- [www.compasspoint.org](http://www.compasspoint.org)
- [www.boardsource.org](http://www.boardsource.org)
- [www.creatingthefuture.com](http://www.creatingthefuture.com)
- [www.asaenet.org](http://www.asaenet.org)
- [www.nabenet.org](http://www.nabenet.org)
Where to Find Me

Elizabeth Derrico
http://www.americanbar.org/groups/bar_services.html
elizabeth.derrico@americanbar.org

Behind Bars  http://www2.americanbar.org/barservices/behindbars/Pages/default.aspx

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