THE AMERICAN BAR ASSOCIATION
SECTION OF LITIGATION

SHAPING THE FUTURE:
A Strategic Plan to Year 50
2018-2023

Report to Council
January 2018

December 14, 2017
INTRODUCTION

In August 2016, the Section began a Strategic Planning process to create a five-year plan to guide the Section in years 2018-2023. The 27-member Strategic Planning Committee reviewed existing Section operations and goals and considered how the Section might approach the next five years, given changes in membership and the evolution of the role of bar associations. The resulting Strategic Plan is now submitted to the Council for approval so that implementation can begin in August 2018.

This Report to Council provides background on the discussions and the drafting process that culminated in the final Strategic Plan and a two-page Executive Summary.

A. INITIAL STEPS IN THE STRATEGIC PLANNING PROCESS

The Section of Litigation Strategic Planning Process began with the appointment of a 27-member planning committee in August 2016. The Committee met for the first time at the Fall Leadership Meeting in Austin, Texas in October 2016. At the first meeting, a brainstorming session was conducted to generate an extensive list of ideas for the Committee’s consideration.

During November and December 2016, extensive resource and background material was provided to the Committee for use as part of the planning process.

In December 2016, the Section engaged David Tabak of Tabak Non Profit Strategies to facilitate two sessions of the Committee at the 2017 Winter Leadership Meeting in Bermuda. Tabak’s engagement included preliminary discussions with then Vice-Chair Gene Vance and Section Director Veronica Munoz to determine the scope and goals for the sessions. Tabak then conducted telephone interviews with four members of the Committee to gain a better understanding of the issues facing and opportunities available to the Section. Tabak also reviewed the extensive resource documents provided to members of the Committee.

In advance of the January meeting, Tabak conducted an online survey of the Committee to determine the members’ opinion of the Section’s strengths, weaknesses, opportunities, threats, priorities, new initiatives and which current programs might be eliminated. Survey participants also evaluated the effectiveness of the Section’s leadership.

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1 A list of Committee Members is attached to this report.
B. DEVELOPING THE FRAMEWORK FOR THE PLAN

The Committee met in person with David Tabak on January 12-13, 2017 for two facilitated sessions. Tabak led a discussion of the background material in order to arrive at a consensus of the course the Section of Litigation must take to better meet the needs of current and future members.

On the second day, Tabak led the Committee through a prioritization exercise as well as the drafting of four strategic goals that can be used as a framework to develop the objects, strategies, and tactics with an anticipated launch of the Strategic Plan in 2018.

The Committee came to a consensus regarding the Section’s priorities for the next five years:

1. Develop and implement a coordinated ABA Strategy;
2. Have sufficient resources to fund current and future activities;
3. Identify and engage the Section’s target market;
4. Offer the programs and services that engage current and future members;
5. Develop and implement a governance structure that meets current and future needs.

The Committee then reached consensus on the broad categories of strategic goals to be included within the Strategic Plan as follows:

1. Programs and Services—Offer programs and services that are relevant to current and future members.
2. Finances—Maintain sufficient financial resources to fund current and future activities.
3. Governance—Develop a governance structure that allows for the successful implementation of the strategic plan.
4. Communications—Develop strategies and channels to effectively and efficiently engage the Section’s target audiences.

C. THE WORK GROUPS

Following the January 2017 meetings, the Committee divided into four Work Groups to address each of the categories of strategic goals. The Work Group Chairs were as follows:

1. Programs & Services—Elizabeth Fenton
2. Revenue & Finances—Larry Kristinik
3. Governance—Lara White
4. Communications—Dawn Du Verney
Each Work Group met in a series of teleconferences in March and April 2017 to address the strategies and issues identified by the full Committee.

The Programs & Services Work Group considered various issues related to content, continuing legal education, networking, diversity & inclusion and good works. The Revenue & Finances Work Group considered issues related to the Bylaws and Financial Charter, leadership funding, non-dues revenue, sponsorship and Section operations and structure. The Governance Work Group considered issues related to the structure and organization of Section leadership and the Council, leadership meetings, Section staff and the path to leadership. The Communications Work Group considered issues related to the Section’s target audience, messaging, social media, publications, email and the website and content delivery.

D. DEVELOPMENT OF CONSENSUS AND THE PLAN

Each of the Work Groups prepared a report of its review of issues under the guidance of 2018-19 Managing Directors Designate Mary Craig Calkins and Christina Plum. The full Committee met again at the May 2017 Spring Leadership Meeting in Napa, California to discuss these reports and achieve consensus. That meeting was followed by a series of four teleconferences through June and July.

At the conclusion of the Committee discussions, the draft plan was prepared for presentation to the Committee at the ABA Annual Meeting in August 2017.

The Committee met in person at the ABA Annual Meeting. Comments offered during that meeting and in the weeks that followed were incorporated into the Strategic Plan. The revised draft Plan was presented to attendees of the Fall Leadership Meeting in Montreal, QC when Chair-Elect Gene Vance provided a summary report of the nine key goals outlined in the Plan. Attendees were asked to submit written comments on forms provided at each table or by email.

In October and November 2017, the comments received at and after the Montreal meeting were incorporated into the Plan. The Strategic Planning Committee approved the Plan in December.

E. PLAN SUMMARY

As the attached Executive Summary explains, there are nine key Goals outlined in the Strategic Plan, along with strategies designed to implement those Goals. The Goals set by the Plan are:

I. MEMBERSHIP - Attract, serve, and retain litigators who practice in a variety of settings by providing opportunities for professional growth and business development and by delivering the products and services they need to thrive.
II. ENGAGEMENT - Provide meaningful opportunities for members to engage within the Section in a manner that best meets their professional needs.

III. COMMUNICATION - Communicate with the Section’s members and other constituencies in a timely and effective manner that meets their needs.

IV. GOVERNANCE - Maintain a governance structure that maximizes the Section’s ability to deliver benefits to its members, provides leadership opportunities to members, and supports responsible oversight of the Section’s activities.

V. DIVERSITY AND INCLUSION - Promote and support the participation of diverse volunteers and members in the Section, its activities, and the broader legal profession.

VI. FINANCES - Ensure responsible stewardship of the Section’s financial resources and the continued generation of sufficient revenue to fulfill the Section’s mission.

VII. CONTENT - Inform, train, and educate the Section’s members and other members of the legal community by effectively creating and delivering content they want and need.

VIII. ADVOCACY
Advocate for litigators, the justice system, and the rule of law.

IX. SERVICE
Promote and support pro bono, access to justice, and good works.

F. IMPLEMENTATION

Implementation of the Strategic Plan will require a complete commitment of the officers, leadership and staff. Each item within the plan will require an action plan from the responsible entity or person identified. The Chair, Council, and Managing Directors will be responsible for oversight of the action plans. Flexibility in implementation will be provided and timelines may be adjusted as the five years of the plan unfold.

As action plans and timelines are created, the Section will need to consider the resources needed to implement priority items. Planning not only includes the addition of activities and initiatives, but the incorporation of them into existing programs and structures. The Section will need to consider partnerships for implementation, as well as the potential need to sunset existing activities to permit innovation as envisioned by the plan.

Once timelines have been agreed upon, responsibility for implementation will be reconfirmed. Certain responsibilities are allocated to existing entities and structures within the Section. It is also anticipated that short term task forces with a clear charge will be needed for implementation in certain areas. Budgetary considerations will also be evaluated as part of implementation of the plan.
A plan matrix will be created and should be viewed as a working document that can be revised as items are added, reprioritized or dropped. Likewise, revision may occur as next steps, responsibilities and time frames are more firmly established. More detailed action planning may be necessary as the implementation occurs. Action plans should, at minimum, answer the following questions:

1. What should this initiative accomplish?
2. Who is the target constituency?
3. What steps need to be taken to accomplish the initiative?
4. Are there partnering opportunities, either internal, external or both?
5. Who is responsible for the initiative? If staff is involved, how much staff time will be required?
6. What is the time frame for implementation?
7. What is the cost, if any?
8. What technology is needed for implementation?
9. How will the initiative be promoted?

Action plans are beneficial because they break projects into discrete tasks that are more easily delegated among volunteers. This will engage more members of the Section in its work. The Section must be prepared for the possibility that a goal within the Plan may cost more or take more time than anticipated. Adjustments are to be expected.

Plan assessment will occur throughout the life of the Plan. A report on the Plan status will be provided to Council at each meeting so that progress toward meeting the goals will be easily monitored. Any action requested by Council must reflect how the project or proposal fits within the Strategic Plan.

G. FORWARD TO THE 50TH ANNIVERSARY

This Strategic Plan will guide the Section to its 50th Anniversary in 2023. For nearly 50 years, the Section has been the leading home of and voice for litigators in the United States. This Plan will ensure continuity of that mission. The leadership of the Section is committed to implementation and confident of future success.
STRATEGIC PLANNING COMMITTEE MEMBERS
2016-18

Palmer Gene Vance II, Chair
William R. Bay
Ronald W. Breaux
Mary Craig Calkins
Laurie Webb Daniel
Barbara J. Dawson
Cathleen M. Devlin
Dawn M. Du Verney
Elizabeth S. Fenton
Koji F. Fukumura
William T. Garcia
Franchesca Hamilton-Acker
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Nan Joesten
Helen B. Kim
D. Larry Kristinik
Beatrice O’Donnell
Mark A. Neubauer
Christina Plum
Laurence F. Pulgram
James A. Reeder, Jr.
Hon. Karen Wells Roby
Harout Jack Samra
Daniel W. Van Horn
Mor Wetzler
Lara E. White
Tiffany M. Williams
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**GOALS**

I. **MEMBERSHIP** - Attract, serve, and retain litigators who practice in a variety of settings by providing opportunities for professional growth and business development and by delivering the products and services they need to thrive.

II. **ENGAGEMENT** - Provide meaningful opportunities for members to engage within the Section in a manner that best meets their professional needs.

III. **COMMUNICATION** - Communicate with the Section’s members and other constituencies in a timely and effective manner that meets their needs.

IV. **GOVERNANCE** - Maintain a governance structure that maximizes the Section’s ability to deliver benefits to its members, provides leadership opportunities to members, and supports responsible oversight of the Section’s activities.

V. **DIVERSITY AND INCLUSION** - Promote and support the participation of diverse volunteers and members in the Section, its activities, and the broader legal profession.

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STRATEGIES

The Strategic Plan identifies more than one hundred strategies to meet those nine goals. The Strategic Plan recommends continuing many strategies that have been employed for years, such as offering top-notch CLE and publications, promoting diversity throughout Section leadership, and offering opportunities for individual professional development through volunteerism. The Strategic Plan also recognizes the need to innovate, given the financial and membership challenges facing the ABA. It identifies numerous new or revised strategies that require specific action by the Council or other entities.

IMPLEMENTATION

The final section of the Strategic Plan outlines plans for implementation. Specifically, action plans for employing each strategy will be developed. A matrix will be created that identifies the responsible entity and the timeline for implementation of each goal and strategy.

A report on the Strategic Plan status will be provided to Council at each meeting so that progress toward meeting the goals will be easily monitored. Any action requested by Council must reflect how the project or proposal fits within the Strategic Plan. Plan assessment will occur throughout the life of the Strategic Plan.

This Strategic Plan will guide the Section to its 50th Anniversary in 2023. For nearly 50 years, the Section has been the leading home of and voice for litigators in the United States. This Strategic Plan will ensure the continuity of that mission. The leadership of the Section is committed to implementation and confident of future success.
Introduction
In August 2016, the Section began a Strategic Planning process designed to create a five-year plan to chart a course for the Section’s next five years. The Strategic Planning Committee reviewed existing Section operations and goals and considered how the Section might approach the next five years, given changes in membership and the evolution of the role of bar associations. The Committee ultimately identified nine primary goals, as well as numerous strategies for achieving each of those goals. The committee also outlined an implementation plan. The Council approved the Strategic Plan in January 2018.

Goals and Strategies
I. MEMBERSHIP
II. ENGAGEMENT
III. COMMUNICATION
IV. GOVERNANCE
V. DIVERSITY AND INCLUSION
VI. FINANCES
VII. CONTENT
VIII. ADVOCACY
IX. SERVICE
I. MEMBERSHIP

Attract, serve, and retain litigators who practice in a variety of settings by providing opportunities for professional growth and business development and by delivering the products and services they need to thrive.

Strategies:

Design specific action plans to increase membership overall, and specifically to focus recruitment and retention activities on these high target demographics:

- Law Students
  - Conduct market research to determine how Section can meet needs
  - Promote benefits of free Section membership to assist with law school success
- Lawyers New to Practice
  - Conduct market research to determine how Section can meet needs
- Diverse Lawyers
- “Whole Firm” Membership Lawyers
- New law firm partners
- Members of the Judiciary
- In House Lawyers
- Solo, Small Firm and Medium Sized Firm Lawyers
- Non-Section ABA Members

Develop and advocate financial policies that encourage participation by members of the high target demographics:

- Section and Association dues
- Introductory discount programs for targeted demographics

Develop broad-based programs focused on retention of existing members:

- Business development content
- Referral networks
- Additional “Section member only” benefits

Provide remote or short travel distance learning and networking events:

- Continue expansion of Regional meetings and networking events
II. ENGAGEMENT
Provide meaningful opportunities for members to engage within the Section in a manner that best meets their professional needs.

Strategies:

Pathways to Leadership:
- Educate volunteers about the various ways they can be involved in leadership, including through appointments, working on committee subcommittees, and volunteering for one-time projects.
- Create a Guide to Leadership and other resources that educate members—including subcommittee co-chairs, liaisons, and participants in the Young Lawyer Leadership Program and Diverse Leaders Academy—about paths to leadership, including how to seek appointments, ways of increasing involvement and information about the general experience required for various positions.
- Encourage committee chairs, Division Directors, and others to provide constructive feedback to volunteers that will allow volunteers to continue to develop leadership skills.

Networking:
- Provide opportunities for members to network with each other, with non-members who are active in local bar associations, with clients, and with lawyers who do not work in private practice, such as in-house counsel and those working in the judiciary. Offer low- or no-cost registration options to encourage the attendance of lawyers who are not in private practice.
- Encourage committees to develop a plan for expanding networking opportunities, such as by offering regular telephonic meetings for committee members and creating networking subcommittees. Provide networking checklists to committees to assist Committee Chairs.
- Develop focused regional outreach and communications to notify members about and involve them in upcoming Section events in their geographic area.
- Explore feasibility of providing website features for members that allow them to identify other Section members throughout the United States and beyond. Also explore using existing social media platform to facilitate networking among members.

Meetings:
- Structure in-person meetings and conferences to provide meaningful opportunities for continuing legal education, professional development, networking, and Section entity involvement.
- Create virtual engagement opportunities so that members can interact using their phones, computers, or other devices.

Larger ABA Issues:
- Continue to develop and expand relationships with other Sections/Divisions/Forums (especially those with similar interests, such as the Business Law Section, the Tort Trial and Insurance Practice Section, the Judicial Division, and the Young Lawyers Division) and identify ways the Section can advance common interests in the ABA and offer joint meetings and programs.
- Be open to opportunities to absorb entities within the ABA that may be looking for support, such as those experiencing budget cuts necessitated by ABA financial challenges.
- After the ABA’s “OneABA” strategy is developed, address how best to engage the Section’s members and attract compatible memberships using that system.
- Assist members in seeking and obtaining ABA Presidential Appointments with consideration of the strategic benefit of the appointment to the Section.
III. COMMUNICATION
Communicate with the Section’s members and other constituencies in a timely and effective manner that meets their needs.

Strategies:

Audience Identification:
- Determine who the Section needs to influence and impact (e.g., members, non-members, the public, lawyers in large and small firms, judges and the judicial system, academics, government lawyers, young lawyers, diverse lawyers, affinity bar associations) and refine the Section’s communications strategy to ensure it is reaching those audiences, such as by using tailored messages to micro-targets of specific groups.
- Reevaluate the Section’s tagline and branding.
- Specifically ensure that the Section’s communications strategy addresses the communication habits of youngest generations of lawyers, including Millennials (Generation Y) and Post-Millennials (Generation Z).

Periodicals:
- Continue to communicate directly with the Section’s members through its flagship publications Litigation Journal and Litigation News, offering quality, in-depth analyses of the law, ethics, and the legal system that is most relevant to the Section’s members and helps them be better lawyers.
- In addition to substantive law articles, continue to provide professional development and practical advice for the Section’s members.
- Consider methods to ensure that the Section’s flagship periodicals are more integrated with the messaging priorities of the Section.
- Direct the editorial boards of the Litigation Journal and Litigation News to conduct regular reviews of the frequency and format of their publications, as well as whether advertising is feasible in those publications.
- Explore the feasibility and desirability of creating additional Section-wide periodicals.

Social Media:
- Develop a comprehensive and practical social media strategy that addresses, among other issues, who will provide content, how best to staff the Section’s social media strategy, and which social media platforms the Section will utilize.
- Develop a tutorial and/or campaign to get Section leadership more involved in social media.

Website:
- Ensure that the Section takes full advantage of the newly designed ABA website, and revisit issues related to the Section web pages after the ABA redesign is complete. This may include discussion of the use and extent of a paywall to reserve certain content for members, keeping in mind the potential impact of a paywall on website traffic.
- Increase traffic to the Section’s website and improve the Section’s tagging and taxonomy to improve searchability.
- Develop website capability to identify local activities and location of members.
- Develop microsites within the ABA website as needed and permitted by ABA policy.

Emails:
- Set goals for determining the right number of emails sent to the Section’s members including better targeting of messages, fewer marketing emails, and combining messages. One priority is to continue sending emails to all members that include information on Section programs, products, and events, as well as a message from the Chair.
• Consider creating a weekly or monthly briefing for the Section’s members that highlights the best articles and programs the Section offers, but again bearing in mind that Section membership is sensitive about receiving too many emails.
• Continue to explore how best to design emails and time their delivery (including using a predictable schedule) so a greater number of members will read them and find them valuable.
• Evaluate design, content, frequency, and effectiveness of member communications to determine if/what adjustments should be made to increase readership and maximize membership value.
• Ensure that emails are mobile-device friendly.
• Assess the effectiveness of each committee’s newsletter and determine whether to continue to require and support the production of newsletters by each committee, taking into account issues such as the size of the committee, the frequency of the committee’s newsletter production, and the role of the newsletter in the committee’s overall activities.
• After the Section reduces its email volume, consider a campaign to get members who have unsubscribed from ABA emails back.

IV. GOVERNANCE

Maintain a governance structure that maximizes the Section’s ability to deliver benefits to its members, provides leadership opportunities to members, and supports responsible oversight of the Section’s activities.

Strategies:

Council and Executive Committee:
• Retain current size of the Council and Executive Committee, with one exception: seek and consider the Chief Diversity Officer/Secretary’s evaluation and recommendation as to whether the positions of Chief Diversity Officer and Secretary should continue to be combined.
• Direct the Council to consider whether there should be term limits for Delegates and members of Council.
• Continue to use Advisory Committee on Nominations to evaluate potential Section officers, other Executive Committee members, and Council members. With respect to At-Large Council seats, the Advisory Committee should ensure that the slate of nominees reflects a variety of Section constituencies.
• Encourage volunteers to serve on the Advisory Committee and to seek election as officers and members of Council.
• The Council Finance Committee and Council Committees established by the Chair shall have a defined set of responsibilities as recommended by the Chair and approved by the Council.
• Formalize an annual operations review and strategic plan assessment by the Council, Executive Committee, or Officers.
• Create a formal “Chairs in Line” planning process chaired by the Section Vice-Chair to develop multi-year program and initiatives commitments from those in the Chair line.
• Monitor and amend Bylaws as needed based upon Strategic Plan implementation.

Open Enrollment Committees:
• Review and make recommendations concerning the open enrollment committee structures, such as whether there should be vice-chairs that become chairs, whether there should be a more formalized subcommittee structure that tracks subcommittee co-chairs, or whether this is left to individual Committees to decide.
• Evaluate whether to place open enrollment committees in different categories based on size and mission, with customized expectations for each category (e.g., expectations related to programming and publications).
• Establish procedures to guide the Council when creating, eliminating or combining open enrollment committees that address the decision-making process and, in the case of eliminated committees, the communication plan for notifying existing committee members and directing them to other engagement opportunities.
• Ensure there is diversity and inclusion within the subcommittee and leadership structure in the open enrollment committees.

Support Committees, Boards, and Task Forces:
• Reinvigorate the ABA Resource Committee by outlining a clear role for that entity.
• Undertake an assessment of the numerous and potentially duplicative Section entities that target young lawyers (e.g., Young Advocates Committee, Young Lawyer Leadership Program, Young Lawyers Task Force, and young lawyer subcommittees of open enrollment committees), so that the Section can determine where there is overlap and suggest the best or combined role for each entity.
• Review the Divisions to which each committee is currently assigned and consider whether to reassign entities (e.g., whether the Children's Rights Litigation Committee should be moved to a substantive law Division).
• Continue to implement and publicize Fellows/Emeritus Programs that provide opportunities for the most experienced Section leaders to assist and advise a new generation of leaders.

Appointments:
• Continue to support a formal leadership appointments process that allows members to self-nominate or nominate others for leadership appointments.
• Seek out feedback from Division Directors, the staff, and others concerning how individual volunteers have performed in current leadership roles.
• Continue actively seeking input from the Chief Diversity Officer, Division Directors, other Section leaders, and minority bar associations to identify diverse volunteers with a wide range of professional experience.
• Avoid setting arbitrary caps on the total number of appointed leaders. Instead, appoint the number of leaders necessary to perform the work of the Section, bearing in mind budgetary constraints that may dictate a reduction in the size of leadership if overall membership is reduced.
• Place leaders into multiple reimbursement categories and provide clear notice of reimbursement policies and exceptions thereto in the appointments process.
• Consider many types of diversity when making appointments, including race and ethnicity, gender, sexual orientation and gender identity, disabilities, practice setting, geography, etc.

Staff:
• Use staff expertise to determine best ways to advance Section goals.
• Provide input to incoming Section Chair and Managing Directors as part of the annual appointments process.
• Section Officers will undertake a periodic review of the Section Director, and will discuss issues such as encouraging advancement without high turnover, right-sizing the staff, and ensuring the staff structure is aligned with Section priorities.
V. DIVERSITY AND INCLUSION
Promote and support the participation of diverse volunteers and members in the Section, its activities, and the broader legal profession.

Strategies:

Recruitment and Appointments:
- Explore ways to increase diversity at the entry-level and subcommittee co-chair level of leadership to ensure a larger pool of diverse applicants for mid-level and senior level appointments, including by continuing the subcommittee diversity efforts begun in summer 2017.
- Charge open enrollment committees with the responsibility to recruit diverse leaders and create a diverse leaders pipeline.
- Solicit recommendations for potential leadership appointees, speakers, writers, and other volunteers from Chief Diversity Officer and diversity-focused committees to ensure a diverse team of volunteers.

Programs and Training:
- Emphasize the Section’s commitment to diversity at the Fall Leadership Meeting, when the largest numbers of volunteers are present for the Fall Leadership workshop.
- Encourage the Chief Diversity Officer, Diversity and Inclusion Committee, and others to develop programming and/or training that emphasizes that commitment.
- Continue to review and regularly update the Diversity Plan, which discusses types of diversity and outlines specific steps to increase diversity.
- Undertake a comprehensive assessment of the Diverse Leaders Academy including tracking rates of retention in leadership.

Outreach:
- Foster relationships with ABA diversity-related entities, such as through the use of liaisons and joint projects.
- Create a plan for interacting with regional and national minority bar associations to ensure consistent outreach and involvement.

VI. FINANCES
Ensure responsible stewardship of the Section’s financial resources and the continued generation of sufficient revenue to fulfill the Section’s mission.

Strategies:

By-Laws and Financial Charter:
- Review and update the current Financial Charter (a/k/a “Budget Policy”) to make it consistent with current practices, the financial environment, and the anticipated approval and implementation of OneABA; propose changes for approval by the Council.
- Revise Section Bylaws to include a section on finances that requires the Section’s Financial Charter to be approved by the Council.

Meetings:
- Consider cost-saving measures for the Section and attendees when selecting in-person meeting sites for Leadership Meetings, CLE programs, and other Section events, such as limiting speaker reimbursement and selecting affordable hotels and social event venues.
• Recommend that the Council establish guidelines for meeting locations that address hotel cost, travel
distance, ground transportation, and the consultation with Council concerning location selection.
• Maintain the practice of not charging a registration fee for volunteers who attend Leadership Meetings,
but carefully evaluate which volunteers are needed at each Leadership Meeting in order to reduce costs
and focus on the most pressing priorities at each particular meeting.
• Review speaker reimbursement policies to ensure the continued availability of speakers while at the same
time limiting the expenditure of Section funds.
• Retain the current leader reimbursement policies, including those that provide greater reimbursement to
certain categories of volunteers (e.g., government lawyers) and those that ask leaders who can seek
reimbursement elsewhere to do so before seeking Section reimbursement. Do not reduce the current
amounts of reimbursement offered under those policies, and continue to entertain requests for
additional reimbursement in extraordinary circumstances.
• Continue to hold the Fall Leadership Meeting and at least one other Leadership Meeting. Evaluate the
invitation categories for all meetings to ensure that entities with specific roles at the meeting are invited.
• Create a committee to examine leadership meetings with the goal of finding opportunities to save
expenses while allowing for the effective performance of the work of the Section and participation by its
members. This committee should be directed to make recommendations, which may include identifying a
particular meeting format or allowing Section Chairs to select the format each year. Among other things,
this committee should consider:
  o Whether there should be only two Leadership Meetings in a bar year;
  o The benefits and challenges of continuing the Winter Leadership Meeting or possibly combining it
    with the ABA Midyear Meeting or other alternatives; and
  o The benefits and challenges of combining the Spring Leadership Meeting with SAC, continuing
    with a traditional Spring Leadership Meeting, or holding a standalone Spring Planning Meeting
    with limited attendees.

Revenue and expenses:
• Develop a system for analyzing the costs and benefits of Section events and projects, including, among
other things, books, CLE meetings, good works, and webpages.
• Explore new projects for the purpose of generating additional revenue streams, such as the creation of an
arbitration joint venture and a national mock trial competition for lawyers.
• Continue to develop new corporate sponsorship opportunities, including some that require a smaller
financial commitment that are carefully crafted so as not to jeopardize existing relationships with larger
sponsors.
• Keep Section dues at their current or lower levels consistent with ABA guidelines, rather than increasing
them to cover budget shortfalls. Prepare for a period of significantly reduced dues revenue in the event
OneABA is approved and implemented.
• Position the Section to maximize the revenue sharing model implemented in the future as part of
OneABA.
• Take steps to encourage the selection of the Section of Litigation as ABA members choose their free entity
memberships as part of OneABA.
• Consider revising existing Section dues pricing models to make the Section an attractive additional entity
membership for ABA members who have already chosen other entities for their free entity memberships,
recognizing that standardized pricing may result from OneABA.
• Evaluate whether and how to use advertising to generate revenue.
• Ensure that sponsorships are valuable for sponsors to encourage their continued support of the Section
and to maintain sponsorship revenue.
• Recognize the value of books as a source of revenue for the Section; provide necessary support to
continue this revenue stream.
• Seek out sponsors for the Section's Good Works projects, including sponsors who are interested in collaborating on specific projects.

VII. CONTENT
Inform, train, and educate the Section's members and other members of the legal community by effectively creating and delivering content they want and need.

Strategies:

For all forms of content, develop a cost-benefit evaluation system that considers the potential and actual reach of each form of content and recommends changes as needed.

Content Plan:
• Create a two-year content plan identifying key substantive areas to be regularly addressed by Section periodicals, books, programs, and projects, such as programs addressing the rules of evidence and ethical rules governing lawyers. Ensure that the content plan also addresses professional development and lawyer well-being topics.
• Address whether open enrollment committees should continue to be a primary source of content.
• Consider hosting a content symposium where all Section content providers can discuss ways to best implement the two-year content plan.
• Consider new methods of monetizing the Section’s content.

Continuing Legal Education:
• Offer in-person CLE that is “right-sized” and narrowly focused. For instance, develop specialized, high-end CLE targeting specific markets.
• Develop a comprehensive plan for CLE sales that includes the development of programs for in-person programming, regional locations, webinars, and webinar replays.
• Consider the extent to which the Section should offer free CLE programs to the Section’s members as a member benefit.
• Determine how to track attendance at in-person CLE events so that the Section can identify the demographics of those who attend particular programs and use that information for future program planning.
• Encourage committees to work together on CLE programming, including repurposing non-CLE programs and articles into CLE programs.
• Streamline the program approval process so that committees can more easily produce CLE meetings and regional meetings.

Non-CLE Programming:
• Continue to provide easy-to-access, timely content that has not been submitted for MCLE approval by promoting telephonic Roundtables, Sound Advice recordings, committee teleconferences, in-person and telephonic brown-bag lunch program, and other programs.

Periodicals:
• Continue to use high-value periodicals such as Litigation Journal, Litigation News, and committee newsletters to benefit members, attract new members, enhance branding, and strengthen the Section’s role as a thought leader in litigation.
• Increase the level of interaction between the Section’s two editorial boards (Litigation Journal and Litigation News) and the Section’s committees, boards, task forces, and other volunteers.
Books:
- Create a business plan for every book that includes a cost-benefit analysis.
- Design a comprehensive marketing and advertising strategy for books that includes promotion across all platforms.
- Consider bundling several books addressing related subject matters for sale at a special price.
- Explore the feasibility of selling electronic versions of books, in whole or in segments.

Video and audio recordings:
- Catalog the existing library of video and audio recordings, including podcasts, Sound Advice recordings, and recordings of Roundtable Programs.
- Determine which programs should continue to be made available, eliminating those that no longer address current law.
- Gather information on the number of consumers of each program and use that information when performing a cost-benefit analysis of continuing to address particular topics in a range of formats.

VIII. ADVOCACY
Advocate for litigators, the justice system, and the rule of law.

Strategies:

Thought Leadership:
- The Section should continue to be a leading voice on the rule of law, ethics and professionalism, pro bono, and issues of national prominence.
- The Section should focus on key litigation areas such as civil procedure and trial practice, as it has been with respect to the revision of the Federal Rules of Civil Procedure.
- The Section should be a resource for and influence the work of the Federal Judicial Center and the rules groups within it.
- The Section should work with the ABA Judicial Division on projects that support the justice system and the rule of law.
- Continue to be a leading voice in the ABA House of Delegates and ABA policy making.
- Consider how we can also influence Congress, using the ABA process for doing so and by seeking to impact the ABA’s selection of annual legislative priorities.

IX. SERVICE
Promote and support pro bono, access to justice, and good works.

Pro Bono:
- Develop programs that encourage members to provide pro bono services.
- Organize pro bono opportunities for members, including providing necessary training to address particular legal needs.

Access to Justice:
- Continue to support the Legal Services NITA program and legal services fundraising.

Good Works:
- Review and update the Section’s current Good Works programs, including determining who has responsibility for each program, best ways to promote continuity year-to-year, creating signature Good
Works programs that appeal to the Section’s members, and whether to focus on particular geographic areas.

- Update Section’s website to reflect current Good Works projects, and improve the Section’s recognition of those projects.
- Consider marketing the Good Works of the Section to attract young lawyers to the Section.
- Share information about the Section’s Good Works with members of the public and the judiciary.
Implementation

Implementation of the Strategic Plan will require a complete commitment of the officers, leadership and staff. Each item within the plan will require an action plan from the responsible entity or person identified. The Chair, Council, and Managing Directors will be responsible for oversight of the action plans. Flexibility in implementation will be provided and timelines may be adjusted as the five years of the plan unfold.

As action plans and timelines are created, the Section will need to consider the resources needed to implement priority items. Planning not only includes the addition of activities and initiatives, but the incorporation of them into existing programs and structures. The Section will need to consider partnerships for implementation, as well as the potential need to sunset existing activities to permit innovation as envisioned by the plan.

Once timelines have been agreed upon, responsibility for implementation will be reconfirmed. Certain responsibilities are allocated to existing entities and structures within the Section. It is also anticipated that short term task forces with a clear charge will be needed for implementation in certain areas. Budgetary considerations will also be evaluated as part of implementation of the plan.

A plan matrix will be created and should be viewed as a working document that can be revised as items are added, reprioritized or dropped. Likewise, revision may occur as next steps, responsibilities and time frames are more firmly established. More detailed action planning may be necessary as the implementation occurs. Action plans should, at minimum, answer the following questions:

1. What should this initiative accomplish?
2. Who is the target constituency?
3. What steps need to be taken to accomplish the initiative?
4. Are there partnering opportunities, either internal, external or both?
5. Who is responsible for the initiative? If staff is involved, how much staff time will be required?
6. What is the time frame for implementation?
7. What is the cost, if any?
8. What technology is needed for implementation?
9. How will the initiative be promoted?

Action plans are beneficial because they break projects into discrete tasks that are more easily delegated among volunteers. This will engage more members of the Section in its work. The Section must be prepared for the possibility that a goal within the Plan may cost more or take more time than anticipated. Adjustments are to be expected.

Plan assessment will occur throughout the life of the Plan. A report on the Plan status will be provided to Council at each meeting so that progress toward meeting the goals will be easily monitored. Any action requested by Council must reflect how the project or proposal fits within the Strategic Plan.

This Strategic Plan will guide the Section to its 50th Anniversary in 2023. For nearly 50 years, the Section has been the leading home of and voice for litigators in the United States. This Plan will ensure the continuation of that mission. The leadership of the Section is committed to implementation and confident of future success.