

CHAPTER 7: IMPLEMENTING THE LONG RANGE PLAN

A. Timetable

You should allow about six months completing the needs assessment (the development of a membership survey will take about three months). The exact amount of time will depend largely on the extensiveness of your assessment. The actual development of the plan will take another few months.

This pamphlet suggests planning in five-year cycles. There are two reasons for this. First, it is unlikely that there will be significant changes across a broad range of items included in the needs assessment in a shorter period of time. Second, the needs assessment process is sufficiently volunteer-intensive that most organizations would not want to repeat it more frequently.

Don't forget, however, that the Long Range Plan, and in particular, its objectives and strategies, must be reviewed informally each year to identify important changes that have occurred within the community or the bar organization that need to be reflected in the plan. As such the plan is in a process of continuous development.

B. Interviews

1. Selecting the Persons to be Interviewed

Your first task is to decide which organizations and/or individuals you will be interviewing to do the needs assessment in each broad area identified. The selection of individuals within the justice system, the profession, and the bar organizations should be done with a view towards getting a representation of the various "political" perspectives as well as the perspectives of both leaders and members.

The selection of community organizations or government agencies will be more difficult in many communities simply because of the overwhelming number of them. First, decide which special needs groups you will include in your needs assessment; ideally, all major groups should be included. Then for each group, select the community group that has the largest client or advocacy base as well as the local government agency that has the most direct contact with the group. If your resources are very limited, you may choose just to interview individuals at an agency such as Catholic Charities which services a broad base of all special needs groups. This approach, however, is not desirable because it will only give you a single perspective on needs and issues.

2. The Interview Document

In developing the interview document, the main thing to remember is that you want to identify the concerns of the person or organization being interviewed and any thoughts they have regarding their interaction with the bar. You should develop a different series of questions for each type of person or organization interviewed. For example, you could probably ask the same series of questions to leaders of different organizations that represent various special needs

groups such as the disabled, person with AIDS, and the elderly. You would, however, develop a different series of questions for conducting an interview with judges or other actors in the judicial system. For the most part, these questions should be open-ended rather than multiple choice. You should also always include a question at the end of every interview that gives the individual the opportunity to add anything they think is relevant to the process.

If you decide to hold group interviews in some situations as suggested above, your list of questions will not change. The only difference is that you will be getting responses from the group for each question, with them interacting on each question.

3. Conducting the Interview

Once you have decided on whom you are going to interview and have designed the interview questionnaires, you should send an introductory letter to each individual requesting the interview. This letter is critical to the success of your needs assessment because your letter needs to convince these very busy people that your interview is worth their time and that it will ultimately have a direct benefit to their group or the issues that they care about. Indicate that you will follow up with a phone call within a few days.

If at all possible, the interview should be tape-recorded. This will give you the most accurate record and will enable the interviewer to draft a report in the peace and quiet of his or her office. The alternative is to take sketchy notes while the individual is talking; this is distracting and not as accurate. If you explain why you are taping the interview, very few individuals will object.

C. Surveys

1. Selecting the Individuals to be Surveyed

The first step is to decide whether you will be surveying just your members or also non-members. If you have access to a list of non-members, it is strongly recommended that they be included in the survey. By being aware of the issues of concern to non-members, both as they concern the profession and your organization specifically, you will be better able to design programs and activities that will attract non-members to join.

The individuals surveyed should be drawn at random from the membership and non-member lists, unless the number of young lawyers in your community is so small – less than a few hundred – that it makes more sense to send the survey to all of them.

2. Designing the Survey

Designing a survey is not as easy as it may seem. On the one hand, anyone can come up with questions that relate to the purpose of the survey. As most of you are aware, however, from reading news reports about various surveys, the way in which questions and answer categories are framed can make a big difference in the answers you receive. In designing a survey, it is critical that the questions are asked in such a way that everyone interprets them the same way,

that they do not lead, and that you get the data that you really need. In order to accomplish this, it is highly recommended that you find someone to use as a consultant, whether paid or not, who has a good background in designing surveys. You can do it without such a person, but the quality of your survey will definitely suffer. Again, remember that your long range planning is not just an abstract exercise, but rather a policy tool that should have important benefits to your organization.

The survey should include a broad range of questions that you feel will tap the potential needs and interests of young lawyers as well as point up potential problems with your organization. You should be careful, however, that you do not let the survey become so long that it is too burdensome to the individual respondent. If it is, it will be less likely that it will be completed.

The survey should be formatted so that it can be data processed. There is no other way to analyze a survey unless you only have twenty members. Further, in order for you to data process the survey easily, virtually all, if not all, questions should be closed-ended; that is, they should have multiple choice answers. This requires careful thought in the survey development phase because you have to be sure that your answer categories capture the most likely range of answers

3. Conducting the Survey

When you conduct a survey, getting a good response rate is everything. That means that your cover letter must describe the project in a way that makes it clear that it is in the individual's own self-interest to complete the survey. It also means that you need to send a reminder letter after a few weeks to those who have not completed the survey. There are other ways to increase response rates or deal with those that don't respond, but they are very expensive and therefore not practical for most bar associations and will not be discussed here.

Your target should be no less than a 50% response rate. This is very definitely a reasonable target with the limited means at your disposal. The important thing is that the smaller the response rate, the more likely it is that your data is statistically unreliable because you don't know if the people who didn't respond are very different from those who did respond.

D. Training Long Range Planning Committee Members

Before the first meeting of the Committee, members should study long range plans of other bar organizations, as well as the current plan of the ABA/YLD.

Previous surveys of lawyers locally, statewide, and nationally will be helpful. Reports of trends in the profession in periodicals such as *The National Law Journal* and the *ABA Journal* also provide excellent background material.

All of this information will be helpful in giving you a broad picture of the areas to address in your needs assessment and the way other bar associations have dealt with the long range planning process. You should be very careful, however, not to let your imagination or process be confined by these materials. They should be used only as a starting point.

Yet the most important preparation for the planning process occurs after the needs assessment has been completed. At that point, each committee member should devote considerable time to review the needs assessment report prior to the first goal and objective development meeting to get a good grasp of all the issues raised by the needs assessment and pull together his or her thoughts on where the organization and the profession are, where they are going, and where they should go.

E. Drafting the Needs Assessment Report

The first step is to have each of the interviewers draft a report on each of their interviews. The interview reports should be structured in the same manner as the interview itself; that is, it should follow the questions asked. Also, a report on the membership survey must be drafted. The survey report should include a narrative discussion of the more interesting data from the survey as well as an actual display of all the data.

One person on the committee should then be assigned to take all of these reports and assemble them (basically do a cut and paste) into a document that is organized by the various topics or needs assessment areas. This is necessary so that all the participants' perspectives on a particular issue can be considered together.

F. Developing Goals and Objectives

Once all of the Long Range Planning Committee members have had a chance to digest the needs assessment report, each committee member should think through, based on the information in the report, what the goals and objectives of your young lawyer organization should be. The committee will then have to meet several times to discuss the various suggestions of its members and come to a consensus as to the goals and objectives and their relative priority.

Remember that your goals and objectives must be a mix of the practical and the visionary; that an important purpose of the bar is to provide leadership. Do not limit your goals of being completed; that is the role of the strategies, not the goals and objectives.

Clearly, however, your goals and objectives will most likely not address all of the issues and needs identified by the needs assessment because of their number and breadth. Your organization has to decide which of the many valid needs of the community, the profession, and its members it wants to or can address; the long range plan must provide a focus for the organization. To include everything would in most cases put an unworkable strain on the resources of the organization; it is demoralizing if an organization cannot make reasonable progress in addressing its goals and objectives. Thus, although each goal and objective is aspirational, taken as a whole, they must set forth a direction and scope of activity that is reasonable for your organization to address.

G. Developing Strategies

If you choose to have your committees develop the strategies as part of their plans of action for the year, you will first have to make sure that they understand the long range plan and how the activities of the committees relate to the plan. The committee's plan of action should reference a goal and objective for each committee activity. Further, the plan should allocate specific resources (including people and money) to each activity, and milestones should be included to monitor progress in the completion of each activity.