

# **Plan, Plan, Who's Got the Plan?**

## **Strategic Planning for Bar Associations**

2007 California Bar Leaders Conference  
September 27, 2007

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# Planning is about focus

“Would you tell me please which way I ought to go from here?’ said Alice.

‘That depends a good deal upon where you want to get to,’ said the Cat.

‘I don’t much care where,’ said Alice.

‘Then it doesn’t matter which way you go,’ said the Cat.

‘--so long as I get SOMEWHERE,’ Alice added as an explanation.

‘Oh, you’re sure to do that,’ said the Cat, ‘if you only walk long enough’”

-Lewis Carroll

*Alice in Wonderland*

# Where to begin?

Is this the right time for your bar association to engage in strategic planning? Consider the following questions.

- Do you know where your bar association is going?
- Does your bar have a vision for the future?
- Has your bar engaged in a discussion about the future?
- Does your association have a clearly stated set of priorities/goals?
- Do you have an action plan to achieve the priorities/goals?
- Is your bar association busy with activities but not achieving its goals?
- Does your board say yes to every project proposal that finds its way on to the board's agenda?

# Why planning?

Strategic planning provides:

- Direction for the future
- Clearly stated priority areas
- Criteria for allocating limited resources
- A means to say, “yes” and/or “no” to project proposals/ideas
- Organizational continuity
- Increased relevance to members

Why planning:

Organizational planning is one of the board’s primary responsibilities.

# Basic Board Responsibilities

Primary responsibilities of nonprofit boards:

1. Define the organization's mission.
2. **Plan for the organization's future.**
3. Establish, monitor, and strengthen the bar's programs and services.
4. Provide financial oversight and long-term financial planning.
5. Serve as ambassadors to members and the community.
6. **Develop the board.**
7. Hire and support the executive director, and regularly assess his or her performance.

Taken from ABA Division for Bar Services *New Bar President and Members of the Board*, page 8.

# Board Development

A companion to successful strategic planning is board development. Board development:

- Provides an opportunity to review board responsibilities
- Sets clear expectations for the coming year
- Communicates the values of the organization
- Establishes the values of the group
- Builds buy-in for association priorities
- Creates a shared experience and group identity for the new board (team building)

# Board Development

Start with a board orientation/education session

- Define the purpose of the session. What do you want to accomplish?
- Schedule a date early in the association year
- Ask board members to commit to the day and time
- Have an agenda
- Get board members involved in creating the agenda
  - Ask, “what do we need to do as a board to be successful?”
  - Ask “what do we need to know as a board to be successful?”
  - What are the board’s expectations for working together?
  - Ask outgoing board members for feedback
- Use a facilitator (or not)
- Get away from the bar association office
- Create a board manual (but don’t overwhelm the board with administrative details during the session)
- Talk, talk, talk
- **Make it fun**

# Board Development

## Sample agenda items:

- Ice Breaker (Something fun to help people get to know each other)
- A bit of historical perspective
- Review of board responsibilities (both legal and not)
- Review of board and officer job descriptions
- Review of any liaison responsibilities
- Attendance policies
- Vision of how the board will work together as a team
- Review of the strategic plan
- Moving the organization forward (implementing the strategic plan)
- Operational plan for the year
- Difference between governing and managing
- How agendas for board meetings are developed
- How agendas are conveyed to board members
- What makes a good team member
- Call to leadership
- Staff interaction and working with the staff

# Board Development

## Other ideas:

- Add an educational component to every board meeting
  - Article in board agenda book
  - Discussion of question identified by board members during orientation preparation but not answered during the orientation
- Attend the ABA BLI – March 13 – 16, 2008, Chicago, IL
- Participate in other leadership training opportunities (California Bar Leaders' Conference)

# Back to Strategic Planning

What are the steps:

## Getting started

- Identify the association's purpose for engaging in the strategic planning process (what do you want to achieve?)
- Get buy-in from the board and executive staff
- Share planning strategy with association membership and describe their role (i.e. member survey)

## Gather information

- Member surveys/needs (E-surveys)
- Stakeholder feedback (board, section and committee chairs)
- Community needs (courts, judiciary)
- Program evaluation (conduct assessment of current programs)

# Strategic Planning

What are the steps con't:

Review mission statement (is your mission statement current?)

- Everything the bar association does should advance its mission

Conduct a planning session

- Create a shared vision for the future -- “Where do we want to be in 3 years?”
- Identify the priorities areas based on the vision
- Determine how the association is going to achieve the priorities (identify action items)
- Identify what success will look like. What is the desired outcome?
- Decide what the board needs to do in order to be successful

Implement the Plan

- Delegate priorities and/or action items to the appropriate people, committees, task forces or other association entities.

# Strategic Planning

What are the steps con't:

Monitor progress on the plan at every board meeting

- Ask responsible parties to provides updates on delegated items
- Identify benchmark dates for reporting updates

Review the plan annually and update as needed

# ABA Division for Bar Services Resources of Interest

## **ABA Division for Bar Services**

<http://www.abanet.org>

Information on resources available to bar associations through the Division for Bar Services and the ABA.

## Consulting Services

<http://www.abanet.org/barserv/consulting.html>

Information on facilitation services available through the Division for Bar Services.

## Governance and Leadership Resource Pages

<http://www.abanet.org/barserv/topicsportalpage.shtml>

**New:** Resource pages on issues of interest to bar executives and bar presidents including governance, leadership, membership, and future of the profession.

# Other Resources of Interest

## Other Places to Go:

National Association of Bar Executives

[http://www.abanet.org/nabe/policy\\_lib.html](http://www.abanet.org/nabe/policy_lib.html)

*Sample documents.*

The Management Assistance Program

[http://www.managementhelp.org/plan\\_dec/str\\_plan/str\\_plan.htm](http://www.managementhelp.org/plan_dec/str_plan/str_plan.htm)

Online library for nonprofits and for-profits

CompassPoint Nonprofit Services

<http://www.compasspoint.org/>

*Great e-mail newsletter for board members.*

BoardSource

<http://www.boardsource.org>

*Publications and training.*

Bob Harris, The NonProfit Center

<http://www.nonprofitcenter.com>

*Tools for board development and organizational development.*

Marc Smiley

<http://www.marcsmiley.com/index2.shtml>

*Tools for planning.*

SurveyMonkey.com

<http://www.surveymonkey.com>

*On-line survey tool.*

# A Final Thought

*"Don't judge each day by the  
harvest you reap but by the seeds  
that you plant."*

*-Robert Louis Stevenson*