



LONG RANGE PLANNING TASK FORCE

2008-2011 STRATEGIC PLAN

Narrative

Background In January 2008, the Columbus Bar Association Long-Range Planning Committee (2008 Committee) under Steve Buchenroth's leadership launched an effort to update a strategic plan which had guided policy and program decisions for several years. Steve had led a similar effort in 1995 which produced the 1995-2000 plan which was subsequently updated and revised in late 1998 by a committee headed by Cynthia Lazarus.

A list of the members of the 2008 Long Range Planning Committee is attached to this document. This group met six times from January to August. This was not a comprehensive, ground-up long range planning process. It started from the premise, which was confirmed in committee meetings, focus groups and a survey, that the Columbus Bar is very healthy, has many outstanding programs which are serving the needs of its members, and that there is no need for concern.

The focus of the committee and its process was to determine areas where member needs were evolving or could be met better, to discern trends that may require the Columbus Bar to make adjustments in its programs and services, and to remain proactive.

Thus, this report and plan document is not intended to replace prior strategic plans, but to supplement and refine strategies and tactics for addressing fundamental concerns.

THEMES AND STRATEGIC ISSUES

In significant measure, the themes and goals of the earlier plans remain relevant to the challenges faced by the Columbus Bar today. Although there has been considerable progress on many fronts, the themes retained their value as statements of the principal challenges. In that sense, they were correctly identified in earlier plans as true strategic challenges which were not to be resolved by single actions or even a series of attacks. However, the progress which was made in addressing them has built the foundation for the actions called for in this long-range plan.

**THEME: DIVERSITY AND INCLUSIVENESS IN MEMBERSHIP,
PARTICIPATION AND LEADERSHIP**

First articulated in the 1995 planning effort, this theme expresses a continuing challenge for the bar association. The earlier plan called for the Columbus Bar to “maintain diversity in board, officers and other leadership positions.” This remains a commitment of the Columbus Bar today. The bar association was also challenged to “find ways to remove obstacles to participation in Columbus Bar activities and leadership by any member.” Lastly, the earlier plan envisioned the bar association establishing “stronger relationships with other associations of lawyers.”

The 2008 committee recognized the progress which the Columbus Bar has made on many fronts under this theme but identified the next targets needed to be addressed. For example, a reading of the accompanying table (*Strategic Plan 2008-2011*) will reveal a number of issues and actions directed at continuing to position the Columbus Bar as open to as wide a participation in its activities among central Ohio lawyers as possible. For example, actions focus on making the Columbus Bar’s services more relevant to the needs of solo and small firm practitioners; to adjusting the pricing structure for continuing legal education offerings; to develop appropriate supportive relationships with existing and emerging specific interest bars; to develop a strategy for responding to the interests of gay, lesbian and trans-gender members of the profession; and to sharpen and extend our strategies for meeting the needs of new lawyers.

These recommendations represent the next wave of Columbus Bar efforts to advance this theme. The committee recognized the progress made since 1995 in this area and assumed that the Columbus Bar will sustain the efforts already underway. What is being called for now are actions addressed at these additional targets.

**THEME: PROVIDING EXCELLENT SERVICES
AND VALUE TO MEMBERS**

Past plans called for the Columbus Bar to “provide great financial benefit, information and services to members.” Included was a call to redefine the role of the Columbus Bar in continuing legal education, to sustain strong committees and increase the use of the lawyer referral service. The 2008 process revealed ways in which the Columbus Bar can continue to advance this theme.

Review of *Strategic Plan 2008-2011* shows a number of ways the 2008 Committee recommends that the CLE program be enhanced. These recommendations are based on the identification of ways in which this already high quality program can be elaborated to do an even better job of meeting the needs of members. Such enhancements include

delivery of some CLE sessions in suburban locations, building on the success of institutes in probate law, bankruptcy and real property, evaluating market response to expanded offerings of shorter CLE programs, and exploring pricing options which may be attractive to our market.

Considerable attention was given by the 2008 Committee to the implications for the Columbus Bar of the generational profile of its members which is including more “millennials” – adults coming of age around 2000 and after. The committee noted the Columbus Bar’s success in revitalizing our new lawyers committee and several recommendations envision building on that program. It should be noted that our stakeholder interviewing revealed that many bar associations are struggling with how to adapt their program to accommodate the desires of this emerging demographic among their membership. Once again, it appeared that the Columbus Bar was in the forefront nationally among bar associations responding to this opportunity.

Some specific recommendations illustrative of this programming thrust include a call to develop CLE offerings and other programming with specific focus on new lawyers’ interest in social interaction with peers, to devise CLE offerings which address the economic imperatives of the first years of practice and to continue to enhance the editorial content of the *Better Lawyer* publication.

Columbus Bar members contacted in our stakeholder interviews and responding to a survey conducted during the planning process endorsed the Columbus Bar’s efforts to expand the use of lawyer referral strategies, including the bar association’s columbuslawyerfinder.com (formerly LIAM) program.

THEME: SERVING MEMBERS’ NEEDS IN A TECHNOLOGICAL AGE

Earlier plans called for the Columbus Bar to “become a leader of technological collaboration among lawyers and firms and work to facilitate adoption of appropriate technology.” The 2008 Committee, through its focus groups and environmental scan processes, confirmed that there is a significant role for the Columbus Bar to play – especially with respect to solo and small firm practitioners. An entire section of the *Strategic Plan 2008-2011* was drafted to respond to this priority. Adoption of this plan will direct the Columbus Bar to 1) assemble a panel of individuals with expertise in software to compile impressions of the potential utility of new and existing software reaching the market for our members; 2) include technological topics in CLE curricula; 3) identify individuals and firms with capability to assist solo and small firm practitioners; 4) convene a technology interest group to meet periodically with systems professionals to discuss commonly recurring issues with software and hardware currently employed in the legal environment.

**THEME: IMPROVING PROFESSIONALISM,
PROFESSIONAL IMAGE, QUALITY OF LIFE AND COLLEGIALLY**

This theme continues to define an important aspect of the work of the bar association. The 2008 Committee recognized that, although the Columbus Bar's function relative to ethics are "off the radar" for most of our members, it remains a service fundamental to the professionalism of the bar. The Columbus Bar enjoys a well-earned reputation for quality response to disciplinary cases and serves as one of the exemplary programs justifying the retention of the responsibility for handling such issues at the local level using peers of the lawyer whose practices are questioned.

In a related area, *Strategic Plan 2008-2011* identifies actions for the Columbus Bar with an indirect focus on improving professionalism. These include using current professional development resources, such as the Daily Reporter and CLE offerings, to communicate more practice management information to our members. This information plus the recommended practice management discussions among peers before selected committee meetings and other Columbus Bar events are intended to provide support for lawyers who want to meet the high standards expected of legal professionals.

THEME: IMPROVING THE JUDICIARY

The 2008 Committee proposed no changes in the Columbus Bar's actions influencing the judicial election process and the legal system. The association's practice in responding to specific opportunities to present the perspective of the organized bar on issues of moment was endorsed. The committee noted the difficulty the Columbus Bar and others have had in mounting a sustained, successful educational program on the workings of the legal system for the general population. It seems the best way to address this theme is still through seizing opportunities presented by contemporary events to express the interests of the bar.

THEME: EXPANDED COMMUNITY SERVICE

The Columbus Bar's current efforts under this theme are seen as sufficient to the needs for the foreseeable future. Enhanced efforts called for in *Strategic Plan 2008-2011* include support to existing and emerging specialty and specific interest bars which should add leverage to their community service efforts. In that same vein, Columbus Bar efforts which have led to the revitalization of the new lawyers group should have a similar outcome.

THEME: STRONG BAR ASSOCIATION OPERATIONS

Past plans have recognized the need for the Columbus Bar to attract and retain qualified and strong leadership and staff. It can be argued that the Columbus Bar is at the peak in terms of its staff capability to support and advance member interests. However, several key staff, including the Executive Director, is approaching the age at which they will begin considering retirement. Particularly as it relates to the Executive Director, it is critical that the Columbus Bar be prepared for this. Therefore, the 2008 Committee recommends that the Board of Governors engage the Executive Director in discussions regarding his retirement horizon and develop and implement an Executive Director succession planning process to deal with that eventuality.

THEME: FINANCIAL STABILITY

The Columbus Bar continues to be sound financially with a ratio of dues to non-dues revenue that has held relatively stable for many years. As a result, the 2008 Committee did not spend much time focusing on this theme. However, the 2008 Committee is comfortable believing that many of our recommendations have the effect of maintaining and increasing membership and thereby supporting a financially strong bar association. We hope services to solo and small firm practitioners, to new lawyers and to all consumers of our programs and services will encourage them to retain membership in their bar association and to encourage non-members to become members. We expect the Columbus Bar's efforts to connect more closely with law schools and with special interest bars will help connect new lawyers with their bar association earlier in their careers.

Strategic Plan 2008-2011

A table listing the specific strategic issues and action recommendations of the 2008 Committee is set out on the pages which follow.