



**Columbus Bar Association  
Strategic Planning Initiative Report  
Summary Report**

*“For time and the world do not stand still. Change is the law of life. And those who look only to the past or the present are certain to miss the future.”*

~John F. Kennedy

**Introduction**

Amidst an uncertain legal economy, a change in staff leadership and recognizing that those services that have been crucial to its success are no longer guaranteed, the Columbus Bar Association (CBA) embarked on a strategic planning initiative in August 2011. The process reflected on myriad changes in the legal practice, legal industry economics, generational expectations, and technological shifts. The fundamental question the Strategic Planning Committee (SPC) grappled with was how to continue to have a preeminent role in serving Central Ohio lawyers and ensure that the necessary resources are available to do so.

**Background on the CBA Planning Initiative**

The CBA kicked off its strategic initiative at its 2011 board retreat by creating a vision for the planning process. In the intervening months, that vision – of a dynamic, forward thinking, engaging process – has become a reality through the commitment and hard work of the Strategic Planning Committee chaired by then president-elect and current Immediate Past President, Brad Wrightsel. Through interviews, focus groups, and surveys, the SPC solicited input from an array of internal and external stakeholders to inform the analysis of the opportunities and challenges facing the CBA. Focus groups were conducted with key member opinion leaders such as past presidents and managing partners. Representative demographic segments of the membership such as young lawyers and senior lawyers were tapped through an electronic survey conducted by members of the SPC. Members of the SPC also conducted one-on-one interviews with representatives of the court, community and access to justice institutions.

To provide further background, the facilitator reviewed the extensive statistical data tracked by the CBA staff to ferret out membership, financial and program trends.

As a result of this input and analysis, the facilitator developed a list of assumptions, challenges and opportunities to provide context to the committee’s work during its planning retreat. Among the

most significant influences are: competition for lawyers' time, attention and dollars, technology and a changing legal profession. There also is greater generational differentiation among members regarding their needs and expectations of association membership.

While the CBA can't single-handedly change the course of legal education, the economics of practice or the mobilization of technology, it can choose how it will react. And it is that reaction that was the subject of the June 2012 planning retreat.

### **The Report on the Planning Retreat**

This report consists of 1) narrative summary with next steps (this document) and 2) plan matrix. The matrix is the encapsulation of the CBA's roadmap to its envisioned future. The format includes supporting activities and strategic opportunities to further the vision for each goal.

### **Summary of the SPC Planning Retreat**

The session consisted of small group and full-group brainstorming discussions centered on creating a three-year vision of CBA as well as goals and strategies to achieve that vision. Several themes permeated the session: preserving the CBA culture of innovation and entrepreneurship, serving as the hub of activity and expertise for lawyers in central Ohio, and exercising problem-solving leadership on issues affecting the administration of justice.

The draft vision for the CBA 2016 is:

*Through innovation, leadership and entrepreneurship the Columbus Bar Association is a key partner in the professional success of Central Ohio Lawyers and the administration of justice.*

The six goals crafted during the session focused on: 1) membership, 2) access to justice, 3) community partnerships, 4) administration of justice/bench-bar relations, 5) developing service opportunities, and 6) infrastructure. To streamline the plan and reduce duplication, the goal areas addressing community partnerships and developing service opportunities have been combined.

The five recommended goals are:

- Goal 1: To be indispensable to the professional and business development of Central Ohio lawyers.
- Goal 2: To support members in meeting their professional and ethical obligation to ensure access to justice.
- Goal 3: To engage in community partnerships benefiting our members and public interest.
- Goal 4: To ensure the quality and efficiency of the administration of justice.
- Goal 5: To develop service opportunities for our members within the community.
- Goal 6: To have the infrastructure and capacity to fulfill our vision.

Each goal is accompanied by strategic areas of focus. The strategic areas represent means of achieving the envisioned ends. Each of the strategies are interconnected and reinforce each other. As an example, by ensuring the competence and caliber of the bench (focus area 3.1) the CBA serves the interests of its members as identified in Goal 1—serving the professional development needs of its members. The activities that support the focuses are similarly aligned. The bar’s referral service aids members in their practice development and reinforces its role as a trusted legal resource for the community.

Participants also identified opportunities for either augmenting current activities or initiating new activities to support these strategies. The proposals that garnered the most interest during the planning session are:

- Developing a new attorney support center and reimagining inc to extend its reach,
- Establishing a CBA presence in the courthouse with a satellite office,
- Providing technology support and infrastructure,
- Investing in entrepreneurial initiatives to create new revenue streams from new or existing services.

These ideas were explored in more detail by the board, SPC and their designees.

The unifying value that binds the CBA vision, goals, strategies and activities together is rooted in the association’s unique relationship with its members. The CBA supports its members not only in their professional development but also provides differentiated services that support the business aspects of running a practice. The leadership role that the CBA exercises within the broader court, legal and public communities is geared toward making lawyers’ practices more efficacious.

## **Next Steps**

The plan was reviewed by the Board of Governors at its 2012 retreat. The board’s role was to review the direction delineated by the planning committee with the understanding that the draft matrix is a spring board for further discussion. This included the board retreat speed storming of two of the new ideas generated in the plan —IT consulting and establishing a courthouse presence— and rethinking two existing primary services—the printed directory and CLE. It was critical for the board to determine the near and short term priorities and align resources with those priorities. The board also established how it will incorporate the plan into its own work.

The strategic plan has been reviewed and revised, and it will be used to develop a staff-designed operational plan. Where the vision and strategy matrix provides an inspirational framework, the operational plan will provide practical guidance. The operational plan will include yearly financial, operational and governing targets for each strategic area. It will also convert the statements of success into measures of success, record milestones, and assign responsibility.

## **Summary**

Throughout its investigative and reflective work, the SPC rooted its vision of the future in the CBA’s well-earned reputation for riding the crest of change and embracing its possibilities. In doing so the association is heeding Allan Kay’s advice that, “The only way to predict the future is to invent it.”