



STRATEGIC PLAN

MCBA Strategic Plan

2016-2018

Executive Summary

THE CHALLENGE

The MCBA was founded in 1914. During that era and for the decades to come, the primary way for attorneys to network was through meeting with one another at various venues. During that time, the MCBA held monthly luncheons where attorneys throughout Maricopa County had an opportunity to connect with one another.

The legal landscape, like much of society, has vastly changed since the inception of the MCBA and none more so than in the past decade. Technology, including social media and email has become a primary source of communication and networking for many lawyers. Additionally, it has become a primary way for the public to interface with lawyers and the legal system. Financial constraints also seem to be creating pressure on attorneys with the consequence that they will not join a voluntary bar association and see a diminished value in “face time.”

In recent years the MCBA has seen a decrease in membership and a decrease in the public seeking assistance for legal services through programs like the Lawyer Referral Service. A major concern is that these two issues act as a barometer for forecasting the future viability of the organization. The MCBA is now faced with the critical question of how to maintain relevancy with both attorneys and the general public while fulfilling its mission of service to its members, the legal profession, the judicial system and the public.

OUR RESPONSE

In response to this ongoing challenge, Immediate Past President Ryan formed the Strategic Planning Committee in 2015. The committee began the process by assessing both internal and external factors that possibly affected the decline in membership and

the emerging needs of the general public and legal profession. The committee did so by discussing relevant issues that affect the public (access to legal resources, legislative issues, etc.), monitoring media for applicable legal issues, interviewing the section and division chairs and by conducting a member survey. Through this process, the committee identified the factors that affect the relevancy of the MCBA in the current legal climate and formulated goals for each area. The committee also identified areas that the members found beneficial and that needed little to no improvement. The crux of the issue of relevancy is how and what methods can be used to increase contact between the target audience and the MCBA. The committee identified two goals to address the general issue of relevancy of the MCBA with both members of the public and the legal profession:

1. Increase the involvement of the Maricopa County legal community in the MCBA.
2. Increase the interaction of the general public with the MCBA.

It is the view of the committee that if interaction between the MCBA, the legal community and general public is increased through the plan stated herein, both audiences will inherently understand the relevancy of the bar association. A focus of this strategic plan is to ensure that the goals and execution plan are simple, realistic and easy to follow. In addition to the goals listed above, the President's annual goals, the MCBA budget drafted by CBIZ and the finance committee and the Executive Director goals will be coalesced with the Strategic Plan to ensure continuity and the likelihood that the plan will be properly executed over the course of the next three years.

VISION STATEMENT

For the legal community and public to view the MCBA as a credible resource on legal and policy issues, a resource for legal assistance, a forum for the judiciary to interact and educate the legal community and a place where legal professionals can connect.

MISSION STATEMENT

The mission of the MCBA is to serve its members, the legal profession, the judicial system and the public.

VALUES

The values of the MCBA have made it a longstanding pillar in the Arizona legal community: the opportunity for professional development through fellowship, leadership and service, the belief of access to justice for all, and the promotion of diversity in the legal system.

GOALS AND STRATEGIES

1. Grow the involvement of the legal community in the MCBA, including that of legal professionals and the judiciary. The target for growth is to increase revenue by \$100,000.00 in six years (Immediate Past-President Ryan's 25k x4)
 - a. Implement new methods of communication to better showcase member benefits, including a clear articulation of the benefits
 - b. Improve current methods of communication to maximize current member involvement
 - c. Eliminate section and division programming that are not fiscally viable; add new section and division programming that is relevant
 - d. Form a task force of Board of Directors to timely take positions controversial legal topics
 - e. Form lawyer self-care committee
 - f. Increase role of Board of Directors in sections/divisions and creative planning
 - g. Develop affinity partners and maximize event sponsorships

2. Grow the interaction of the general public with the MCBA.
 - a. Maintain and expand the LRS program
 - b. Increase participation of the public in free legal services like legal clinics, VLP and LAWS programs
 - c. Increase participation of the public in forums regarding current legal and policy issues

BENCHMARKS

1. SERVICE TO MEMBERS AND LEGAL PROFESSION

1a. New Communication Methods

Three- Year Bench Marks

- Interactive Social Media Communication
 - Create a communications task force
 - Develop and implement a viable interactive social media communication strategy
 - Identify what opportunities are available for interns in the organization
 - Retain an intern to assist in the interactive social media communication
- FAT (“Funkathon” after Past President David Funkhouser’s annual membership drive) shall be in the form of a membership drive
- Board emphasis of interpersonal promotion of MCBA: board member to host event once per quarter for potential members

1b. Improve Current Communications

Three- Year Bench Marks

- Yearly outreach to all Maricopa Lawyers
- Director of Membership to work with graphic design artist for new logo
- Color notecard reminders for CLEs
- Enhancing use of Maricopa Lawyer: member spotlight, volunteer of the month, section or division chair to publish one article per month, publicizing section and division members
- Implement a comprehensive rebranding of the organization
- Implement a master calendar

1c. Section/ Division Management

Three-Year Bench Marks

- More section and division accountability and participation in the board
- Ensure within 3 year period that all sections and divisions are fiscally viable/ identify and restructure sections that are not relevant or fiscally viable

- Develop a blue print with the assistance of the directors for each section and division. The blue print should include bios for staff, officer bios, contact information for organization, list of past activities and goals and requirement for formal transition of chair
- Each section and division to communicate a new member benefit annually
- Each section and division to give input on developed blue print that will be reviewed and revised annually¹
- Include judicial involvement in sections and divisions where appropriate
- Send letter of introduction to section/division board member's employer regarding role in MCBA

1d. Controversial Legal Topics

Three-Year Bench Marks

- Develop policies and procedures for identifying, disseminating and debating controversial legal topics
- Board of Directors to timely communicate controversial legal topics with purpose of holding forum or taking a public position
- One forum per year, no charge
- Publish three articles in Maricopa Lawyer either in conjunction with forum or individually

1e. Lawyer Self-Care

Three-Year Bench Marks

- Form self-care committee
- Create a page on MCBA website dedicated to self-care that is updated regularly
- Hold an annual CLE program that focuses on one of the following four categories: work/life balance, compassion fatigue, procrastination or healthy boundaries
- Expand scope of self-care committee contingent on State Bar of AZ's role in lawyer discipline and member assistance

1f. Board of Directors Role

Three-Year Bench Marks

¹ The section and division chairs had individual feedback when surveyed that would be incorporated into the blueprint.

- Shift focus of board to program planning
- Implement use of “dashboard” analysis at monthly board meetings to assist in shifted role of board to program planning and governance
- Each section and division chair to attend at least one board meeting per year
- Board of Director members to assist staff in creative planning for communications, CLE and LRS
- Board of Directors to evaluate and assist the directors in execution of their goals
- Board of Directors to clearly communicate deadlines, expectations, possible solutions and goals to program directors
- Board of Directors to engage in a “who, what, where, why and how” analysis prior to delegation of tasks to MCBA staff
- Board of Directors to raise controversial legal topics in a timely manner

2. SERVICE TO GENERAL PUBLIC

2a. LRS

Three-Year Bench Marks

- LRS materials in at least 10 large business/factory break rooms
- Target companies with no prepaid legal services
- Corporate division to assist with contact with area corporations and business to send materials to HR departments
- Develop a more robust marketing strategy
- Develop a viable modest means program
- Provide more services to LRS customers
- Rebrand LRS

2b. Increase public participation in existing programs

Three-Year Bench Marks

- YLD’s legal clinics to have an annual community partner, 50 participants
- Legal clinics to increase to twice per year
- LAWS to partner with Freshstart Women’s center and be included in annual program agenda in January
- Two community partners that advertise LAWS and legal clinics
- Identify a media partner and a media strategy of specific items that the partner can assist the MCBA (new communications)

- Increase the visibility of MCBA programs through routine communication including press releases
- YLD to continue public service programs of the bar and have blue print of division tasks and services

2c. Increase public participation in forums

Three-Year Bench Marks

- The Board shall identify a media partner and a media strategy of specific items in which the partner can assist the MCBA
- The Executive Director shall develop and implement a systematic approach for communication of MCBA events, legal forums and topics that are relevant to the legal community and public
- Implement new methods of communication through the media partner to inform public of forums
- Advertise forums at law schools
- Recruit the help of past presidents to assist in advertising of forums and in finding speakers
- Develop a focused and unified marketing strategy for events
- Expand partnerships with other organizations

EXECUTIVE COMMITTEE REVIEW

The Executive Committee shall review progress of implementation of strategic plan once per quarter with Executive Director and program directors.

