

2017 – 2019 Toledo Bar Association Strategic Plan

Themes, Goals and Action Items

Theme 1 - Service to Our Members

- Goal 1 - Be an Essential Resource for Professional and Business Development
 - update the CLE program to meet the changing educational needs of today's members
 - transform the lawyer referral service into an essential business development tool
 - partner with companies that can assist members with important business operational activities (such as marketing, IT, staffing, etc.)
 - provide forums that bring the business and legal communities together to facilitate client development (and also attract corporate lawyers to membership)
 - help members create an on-line presence (developing individual websites, etc.)
 - develop opportunities to more closely partner with UT Law School student members
 - develop an ethics hotline for providing information to members

- Goal 2 - Offer Services That Make It More Economical to Practice Law
 - partner with national purchasing vendors for discounts on national brands
 - develop discount programs for local vendors (dry cleaning, Toledo Club, etc.)
 - provide more and better usable space for members within the TBA building
 - explore sources of member insurance programs (health, professional liability, etc.)

- Goal 3 - Provide a Relevant Mix of Services and Benefits
 - implement a program and service evaluation matrix that evaluates one-third of TBA programs each year
 - develop a member services dashboard that provides for easy tracking of usage and participation in TBA services and activities
 - institute a tri-annual comprehensive membership survey to evaluate all performance aspects of the TBA
 - implement an annual non-renewal survey
 - develop a personal or in-person outreach plan that focuses on key stakeholders
 - determine why different segments of the Toledo legal community join the TBA and leverage that information toward future recruitment and retention efforts
 - conduct surveys that generate better quality feedback from participants at TBA events
 - implement cataloging process within the TBA membership database for one-off type feedback from members and non-members

- Goal 4 - Create Maximum Awareness of the Benefits of Membership
 - develop individual marketing plans for major products, services, and events
 - build a master calendar that outlines all member communications
 - develop a campaign tracking system for all marketing channels

- develop a social media strategy and supporting calendar
- optimize the TBA website
- use search engine marketing to promote on-line services such as lawyer referral, etc.
- determine types of content that the TBA and its membership can generate and the efficacy of moving to a content marketing strategy
- implement video content from key influencers to market programs/services
- migrate messaging from focusing on the “what” to focusing on the “why”
- develop elevator speeches for key influencers in different demographics

Theme 2 - Service to the Public

- Goal 1 - Promote the Fair, Efficient, and Accessible Delivery of Legal Services
 - improve and expand the existing pro bono, lawyer referral, and modest means public service programs
 - grow funding for other access to justice programs (expanding joint fundraising campaign with LAWO and ABLE, etc.)
 - promote the selection of a competent judiciary through judicial polls and public education offerings
- Goal 2 - Provide Opportunities for Bench and Bar Involvement in the Community
 - develop and promote opportunities for community and charitable volunteering work (Habitat for Humanity builds, Cherry Street Mission, etc.)
 - expand media volunteering opportunities (Ask a Lawyer, Call for Action, etc.)
 - promote law-related education opportunities (classroom programs, high school mock trial competition, Law Day essay contest, etc.)
- Goal 3 - Elevate Public Awareness of the Community Roles of the Bench and Bar
 - develop a public awareness campaign using standard and social media outlets
 - develop non-profit board training for young lawyers and other interested members
 - implement more proactive public relations activities and campaigns
 - develop a legal economic impact study on Toledo and leverage those results for use with local government and business development leaders
 - promote Executive Director and other volunteer involvements in local business development and other efforts
 - highlight works of individual members through the TBA and the Access to Justice awards programs
 - work with the TBA Foundation to highlight grants awarded to organizations that support its mission in the community
 - develop a “lawyers on call” program modeled after the Cleveland Clinic’s “Doctors on Call” program
 - investigate public/private partnerships with Lucas and surrounding counties (such as the Safety Education program currently offered through the DuPage County Bar Association and the National Safety Council)

Theme 3 - Service to Our Association

- Goal 1 - Increase the Efficiency of the Staff and the Delivery of Services to Members
 - determine staff training needs on the membership database and other existing software packages
 - review leases on equipment to ensure that capabilities and pricing are properly aligned with needs
 - provide better connectivity for members within the TBA building (Wi-Fi, electrical power, etc.)
 - strengthen on-line lawyer referral capabilities
 - evaluate, select, and purchase new e-mail and marketing automation software programs
 - implement best practices for calendaring, communications, and member services, and determine if a better project management system is needed
 - further develop digital advertising sales in TBA E-News, other e-mail publications, and the website

- Goal 2 - Ensure That Best Internal Practices Are Being Employed
 - benchmark the TBA against similarly-sized organizations through participation in the Conference of Metropolitan Bar Associations
 - continue to have the TBA 1st Vice President attend the Bar Leadership Institute
 - continue to have officers attend the National Conference of Bar Presidents meetings
 - conduct an audit of TBA policies and procedures, and issue a report to the Board of Directors with any recommended changes

- Goal 3 - Develop a More Contemporary, Efficient, and Useful Premises
 - adopt a renovation plan and pricing proposal
 - develop a transition plan so staff can continue working during renovation
 - determine proposal for funding renovation, including consideration of a capital development campaign to reduce impact on TBA reserves

- Goal 4 - Achieve Growth and Improve Retention in All Categories of Membership
 - define, quantify, and rate opportunities for different non-member target markets that promote a more diverse and inclusive membership
 - evaluate dues structure to ensure marketability to all segments of lawyers
 - develop more collaborative relationships with other Toledo legal associations
 - develop and execute an annual membership recruitment plan broken down by target markets, tactics, and messages
 - develop and execute an annual retention plan (ambassador program, etc.)
 - develop a first year member outreach program
 - develop and implement a robust sponsorship program