

WESTCHESTER COUNTY BAR ASSOCIATION STRATEGIC PLAN 2016-2019

Westchester County Bar Association Mission Statement

As stated in Article II of its By-Laws, the purposes of the Association are to promote the ends of justice, to cultivate the science of jurisprudence, to maintain the availability of the law to all who seek redress, to facilitate the administration of justice, to elevate the standard of integrity, honor, competence and courtesy in the legal profession, and to participate with all members of society in seeking and perfecting the common good.

Goal 1

Promote future sustainability of the Association by increasing the number of members in the membership category of admitted to the bar for 1 to 9 years.

Objective 1: Continue and expand recruitment efforts to attract members in this category.

Strategies:

Continuing

- Recruitment of student members at local law schools
- Meet the Judges
- Bar After the Bar
- New Lawyers Leadership Award
- Use of social media and technology to publicize the benefits of Association membership

New/Additional

- Targeted email and social media invitations to law school students to encourage participation in Association events, sections, committees
- Targeted email and social media invitations to members in this category to submit articles for possible publication in the WCBA Magazine (*Westchester Lawyer*) and Journal.

- Encourage and develop incentives for employers of individuals eligible for this category of membership to encourage such individuals to become members
- Annual target mailing to newly admitted attorneys residing in Westchester.
- Welcome letter/email and/or telephone call from Bar Leader (Section Co-Chair, Committee Co-Chair, Officer, Former President, or Board Member) to welcome each new member to the organization and suggest Sections or Committees that fit with individual's interests, if known.
- Consider developing a mechanism to spotlight a new lawyer on a monthly basis

Responsible: New Lawyers Section, Membership & Benefits Committee, Staff

Success: Increased posts to and/or hits/follows to website, Facebook page, twitter, etc. Increasing the number of members in this category by 15% each year.

Milestones:

- Monitor membership numbers on a quarterly basis.
- Develop form welcome letter for Bar Leader use by March 1, 2016.
- Send welcome letters to new members who joined from January 1 to March 15 by April 1, 2016.
- Obtain OCA list of attorneys admitted to practice law during 2015 by June 1, 2016.
- Solicit Westchester residents listed on OCA list by July 1, 2016.
- Development of action plan and benchmarks for employer outreach and incentives by January 1, 2017.

Objective 2: Articulate and expand the benefits and supports available for members in this category. What is the “Get” for this membership category?

Strategies:

Continuing

- Meet the Judges

- Bar After the Bar
- New Lawyers Leadership Award
- Opportunities for publication in WCBA Magazine (*Westchester Lawyer*) and Journal
- Articulating to this category of potential members the value of and opportunity for networking events with Judges
- Articulating to this category of potential members the value of and opportunity for networking events with members of the bar, *e.g.* potential employers, referral sources
- Increased visibility of member benefits, availability of insurance plans, discounts on supplies and services, etc.

New/Additional

- Develop means to offer mentoring opportunities for young lawyers
- Increase frequency of inexpensive, casual social events
- Introduce a family friendly social event
- Develop resume and interview workshops and resources
- Develop roundtable programs/events to allow interaction with similarly situated colleagues and/or mentors.
- Increase CLE programs focused on development of professional skills – reading/analyzing financial statements, reading/analyzing medical records, drafting complaints, briefs, motions, affidavits, etc.
- Increase business management CLE programs

Responsible: New Lawyers Section, Membership & Benefits Committee, CLE Committee Staff

Success: Providing mentoring opportunities or program(s) for new lawyers. Increase number of CLE programs focused on skill development and/or practice management by 10% each year. Increase frequency of inexpensive social events by 10% each year.

Milestones: Development of action plan and benchmarks for mentoring opportunities and/or program, resume and interview workshops and roundtable events by January 1, 2017.

Goal 2

Promote future sustainability of the Association and foster inclusive community of lawyers by strengthening member retention, expanding membership base and increasing member engagement in Association activities and events.

Objective 1: Continue and expand recruitment efforts to attract members in all categories:

- Expand membership of Membership Committee
- Create subcommittees of Membership Committee each of which is tasked with developing and executing recruitment plans for a discrete category of members
 - Lawyers admitted 0 to 9 years
 - Lawyers practicing in firms having more than five lawyers
 - Solo practitioners and lawyers practicing in firms having five or fewer lawyers
 - In-house counsel
 - Government and not-for-profit attorneys
 - Law professors
- Consider offering incentives (*i.e.*, prizes, lotteries, discounts) for early payment of dues, payment of multi-year dues up front, group discounts.
- Consider implementing automatic credit card payment for annual renewal of dues
- Encourage and develop incentives (*i.e.*, prizes, Lotteries, discounts, contests, awards) for members to recruit new members.
- Continue membership retention methods of call-o-thons and email follow-ups. Expand use of Facebook and social media for member solicitation.
- Thank you letter/email from Bar Leader (Section Co-Chair, Committee Co-Chair, Officer, Former President, or Board Member) to acknowledge continued membership and to suggest certain Sections or Committees that align with members' interest, if member is not a member of any Section or Committee.

- Develop marketing plan to reach attorneys practicing or residing in Westchester County who are not currently members (Posters in courthouses, Train Stations, etc.).
- Develop and implement Membership Survey to ascertain current needs and interests of Association.
- Explore bundling memberships in different bar associations or other organizations with discounted membership in the Association.
- Explore expanding events and connections with Westchester business organizations

Responsible: New Lawyers Section, Membership & Benefits Committee, Staff, Executive Committee, Board of Directors

Success: Increased posts to and/or hits/follows to website, Facebook page, twitter, etc. Increasing the number of members by 10% in 2017 and 15% in 2018.

Milestones:

- Monitor membership numbers on a quarterly basis.
- Develop form thank you letter for Bar Leader use by March 1, 2016.
- Assignment of Subcommittees of Membership Committee by June 1, 2016
- Development of action plan and benchmarks for Subcommittees of Membership Committee by January 1, 2017.
- Introduction of Incentive Program by June 1, 2017

Objective 2: Articulate and expand the benefits and supports available for members. What is the “Get” for membership? How to increase involvement?

Strategies:

- Explore expanding events and connections with Westchester business organizations
- Encourage interactions among Committees and Sections
- Consider term limits on leadership positions so leadership opportunities are expanded among membership
- Communicate organizational structure of organization to members

- Provide contact information on website and annual renewal notices for members who are interested in increasing their role in organization
- Articulating to all categories of potential members the value of and opportunity for networking events with members of the bar, *e.g.* potential employers, referral sources.
- Increased visibility of member benefits, availability of insurance plans, discounts on supplies and services, etc.
- Develop on-line member, section, committee and affiliate directories with photographs.
- Increase frequency of inexpensive, casual social events
- Introduce a family friendly social event.
- Develop roundtable programs/events to allow interaction among Committee members and similarly situated colleagues.
- Increase CLE programs focused on development of law practice management, efficient research methods/technology, timekeeping software, client billing software/methods, etc.
- Continue to expand member benefits related to practice of law (shred days, discounted record storage, etc.).

Responsible: Membership & Benefits Committee, CLE Committee, Law Practice Management Committee, Executive Committee, Board of Directors, Staff

Success: Providing mentoring opportunities or program(s) for new lawyers. Increase number of CLE programs focused on practice management by 10% each year. Increase frequency of inexpensive social events by 10% each year. Introduction of a family friendly event.

Milestones: TBD

Objective 3: Expand variety of topical articles in Westchester Lawyer WCBA Journal

Strategies:

- Task each Section with contributing at least two articles on an annual basis on two district topics by two district authors

- Task each committee relating to a legal practice area (*e.g.*, Education Law, Diversity etc., but not Budget & Finance, By-law, Journal, etc.) on an annual basis to contribute an article to the Westchester Lawyer and/or Journal
- Encourage affiliate members to contribute articles to Westchester Lawyer

Success: Publication of a distinct topical legal article in each of monthly Westchester Lawyer in 12 month period.

Milestones: TBD

Goal 3

Develop a long range financial plan for the Association.

Objective 1: Develop and monitor compliance with annual budget of the Association.

Strategies:

- Staff reports to Treasurer bi-weekly balance of the Association's bank accounts, the revenue received and expenditures made.
- Staff reconciles checking account statements with recorded deposits and issued checks on monthly basis
- At least quarterly, the Treasurer prepares written reports on the Association's financial condition, which (1) compares budgeted revenues and expenses, actual revenues and expenses of the current year through the date of the report, and actual revenues and expenses of the prior year during a comparable reporting period; (2) any projected budgetary surplus/deficit; and (3) if applicable, proposes methods of addressing any projected deficit.

Responsible: Treasurer, President, Budget and Finance Committee, Staff

Success: Development of annual budget for ensuing membership year on or before December 1 each year. Submission of quarterly reports comparing budgeted expenses and revenues to the actual expenses and revenues.

Objective 2: Evaluate sources of revenue and expenses.

Strategies:

- Identify association expenses and seek to limit expenses to the maximum extent practicable.
 - Staff salaries
 - Staff benefits
 - Rent – seek less costly office space upon expiration of current lease
 - Office supplies/Equipment
 - Accountants and other retained Consultants
 - Technology hardware/software/licensing
 - Periodic extraordinary expenses
 - CLE Programs
 - Explore limiting duplication of CLE program materials by providing materials in advance of programs in downloadable formats or alternative media (DVD, CD-ROM, Flash Drive).
- Identify revenue sources
 - Dues
 - CLE Programs
 - Events: Annual Meeting, Banquet, Golf Outing
 - Advertising on website, in Journal and in Magazine
 - Sponsorships
 - Consider a check off on renewal form for voluntary contribution to WCBA to defray organizational costs.
- Seek to expand or add to revenue sources
 - Establish a task force or assign an existing committee with working with Association Staff to expand the Association's list of potential advertisers and sponsors, to identify and/or develop contacts and to tailor or expand materials used and/or outreach approaches to potential advertisers and sponsors
 - Explore increasing membership and section dues
 - Explore development of a fundraising event for the Association
- Seek to expand the use of technology to increase operational efficiencies and decrease operational costs.

- Communicate the Association’s budgetary and financial goals to its sections and committees and educate sections and committees on how they impact the Association’s budgetary and financial goals.

Responsible: Treasurer, President, Budget and Finance Committee, Membership Committee, CLE Committee, Staff

Success: Increase revenues and maintain or decrease expenses.

Milestones: Establish a task force or assign an existing committee with working with Association Staff to expand the Association’s list of potential advertisers and sponsors by April 1, 2016.

Objective 3: Set long-term financial goals for the Association.

Strategies:

- Analyze budgetary trends over past 10 years
- Identify anticipated staffing needs
- Identify anticipated office/storage space needs
- Analyze profitability of annual events

Responsible: Treasurer, President, Budget and Finance Committee, Staff

Success: Report long-term financial goals to Executive Committee and Board of Directors.

Milestones: TBD.

Goal 4

Increase public access to, understanding of and respect for the legal system.

Objective 1: Inform and educate the public about the court system.

Strategies:

- Seek to publish informative articles in local community publications
- Create brochure listing contact information for all organizations that offer free or reduced cost legal services
- Create directory of all courts in Westchester County that describe their jurisdiction and all applicable appellate courts

Responsible: Form New Public Service Committee, Staff

Success: Publication of article in local community; publication of brochure and directory.

Milestones:

- First draft of brochure by January 1, 2017
- First draft of directory by January 1, 2017

Objective 2: Promote, facilitate and publicize public service activities by WCBA members

Strategies:

- Publish articles in WCBA Magazine and local publications re pro bono activities of members
- Connect members with pro bono opportunities. Develop list of organizations seeking pro bono services.
- Continue and expand public service activities/events of Association (*e.g.*, veteran activities. . .).
- Offer programs in conjunction with the courts, public service organizations and organizations that offer free or reduced cost legal services.

Responsible: Create new Public Service Committee, Pro Bono Committee, Staff

Success: Increase Public Service activities/events by 20% by January 1, 2019

Milestones: Add an additional Public Service event to Association activities by June 1, 2017.

Goal 5

Implementation of this strategic plan.

Objective 1: Designate responsibility for implementation of one of the goals in this Strategic Plan.

Strategies:

- Form Subcommittees of the Strategic Planning Committee each of which is tasked with overseeing the implementation of one of the goals. No one individual should be a member of more than one Subcommittee.
- Designate one or more members of the Executive Committee and/or Board of Directors with overseeing the implementation of one of the goals. No one member of the Executive Committee and/or Board of Directors should be specifically tasked with overseeing the implementation of more than one goal.
- Designate a member of each Committee or Section listed in the “Responsible” section of each objective of each goal with overseeing the implementation of such objective/goal. With the exception of the members of the Strategic Planning Committee, no one member of a Committee or Section should be tasked with overseeing the implementation of more than one goal.
- Post finalized strategic plan on Association’s website

Responsible: Strategic Planning Committee, Executive Committee, Board of Directors Committee Co-Chairs, Section Officers/Co-Chairs

Success: Designation of responsibility by March 1, 2016.

Objective 2: Establish tasks, strategies and timetables for implementation of each objective of each goal.

Strategies:

- Once established, attach written task sheets with timetables for implementation of each objective/goal to the Strategic Plan.

- Review and update established tasks, strategies and timetables for implementation on a semi-annual basis.

Responsible: Applicable Subcommittee of the Strategic Planning Committee, Strategic Planning Committee, Applicable Member(s) of Executive Committee/Board of Directors, Applicable Member(s) of applicable Section(s)/Committee(s)

Success: Establish preliminary tasks, strategies and timetables by July 1, 2016. Review and update tasks, strategies and timetables for implementation of Goal objectives on a quarterly basis.

Objective 3: Monitor progress of implementation of each objective of each goal.

Strategies:

- Each Subcommittee of the Strategic Planning Committee report to the full Committee on the implementation of each objective of the assigned goal on a quarterly basis.
- The Strategic Planning Committee and designated members of the Executive Committee and Board of Directors report to the Executive Committee and Board of Directors on a semi-annual basis on the progress of the implementation of the goals and objectives in the Strategic Plan.
- The Strategic Planning Committee and designated members of the Executive Committee and Board of Directors submit a written report in December of each year documenting the steps taken to implement the strategic plan and tasks remaining.
- Periodic articles and/or posts in the WCBA *Westchester Lawyer*, on the Association website, on the Association Facebook page, through the Association's twitter account regarding the implementation of the Strategic Plan
- Establish with staff members data collection methods to efficiently, and to the extent possible automatically, track/monitor progress on success of strategies implemented under the Strategic Plan.
- Assign a staff member of the Association to monitor progress on each goal and/or objective in the Strategic Plan.

Responsible: Applicable Subcommittee of the Strategic Planning Committee, Strategic Planning Committee, Executive Committee, Board of Directors, Applicable Member(s) of applicable Section(s)/Committee(s), Staff

Success: Submission of annual progress reports. Achievement of goals in the Strategic Plan.

Objective 4: Review and update By-Laws as needed to facilitate implementation of the Strategic Plan.

Responsible: By-Law Committee, Board of Directors

Success: Adoption of proposed By-Law amendments.

Milestones: Proposed By-law amendments by January 1, 2017.