



The Voice of the  
Defense Bar™



# A Guide to Strategic Planning for State and Local Defense Organizations

*By John C. Trimble and Frank Ramos*



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John is a self-described bar association “junkie” who has been president of the Defense Trial Counsel of Indiana and president of the Indianapolis Bar Association. He belongs to and is active in some degree in 11 bar associations. He is a past DRI State Representative and past DRI Board member. He has chaired multiple committees and task forces for DRI, including 4 years as chair of the SLDO Relationship Committee. During the course of his many years of DRI involvement he has facilitated nearly 30 strategic planning retreats for state and local defense associations. Most recently he has chaired the Law Practice Management Committee of DRI, and in his spare time he does consulting for law firms on practice management issues. He also writes a regular column for the Indiana Lawyer newspaper called, “Eye on the Profession.”

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John and his wife, Ann, have two married daughters and a grandson. Their daughter, Marie Trimble Holvick, is a defense lawyer with Gordon & Rees in San Francisco.

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## Frank Ramos



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This Frank's sixth book. His other five books include—Go Motivate Yourself, From Law School to Litigator, The Associates' Handbook, Attorney Marketing 101 and Training Your Law Firm Associates. He has written over 150 articles and has edited four books—The Defense Speaks, The Trial Tactics Defense Manual, The Deposition Manual and Leadership for Lawyers. Please follow him on LinkedIn, where he regularly posts, or feel free to e-mail him at [framos@cspalaw.com](mailto:framos@cspalaw.com). You can download for free four of his books:

[Go Motivate Yourself—Stop Chasing Gurus and Do the Hard Work](#)

[Attorney Marketing 101](#)

[Training Your Law Firm Associates](#)

[The Associate's Handbook](#)



# Strategic Planning

## Why Have a Strategic Plan?

Voluntary bar associations are struggling. Membership is down. Attendance is down. Revenue is down. Gone are the days when law firms paid for all their lawyers to belong to voluntary bar associations and attend their events. Firms, looking to cut costs, have taken an ax to membership dues and conference attendance. Yes, this is short sighted. But this, as bar leaders, is our reality. We can no longer assume attorneys will flock to our organizations. We have to convince them to join and convince them to stay and participate. The old paradigm of assuming attorneys will join and participate is dead. Either we proactively evolve and grow or we die. Nothing says that our organizations must exist forever. Don't assume because your voluntary bar association just celebrated its 25th, 50th or even 75th anniversary that it is going to last forever.

And this brings us to the “why.” Why have a strategic plan? A strategic plan forces an organization to think about its future and how it plans to embrace and tackle that future. A strategic plan puts a mirror up to the organization so it can see what's working, what's not, what challenges it faces, and what opportunities are available. And a strategic plan helps an organization innovate, dream evolve and grow to identify and meet the needs of its members.

The exercise of sitting down and thinking through the rationale for your organization—why it exists—who it serves—its purpose—starts a dialogue and spurs the imagination about what's possible, about how the organization not only survives, but thrives. If you've never done a strategic plan before, we'll tell you how. If you have, you may want to revisit it, and you can learn how here.

This manual is an update of *A Guide to Long Range Planning for State and Local Defense Organizations*, which DRI published in 2010 under Editor John Trimble. In it, DRI shared best practices of how state and local defense organizations (hereinafter “SLDOs”) could be successful. This update is based on John having led about thirty strategic planning retreats with voluntary bar associations and Frank Ramos having worked with nonprofits and charitable organizations to plan and execute their strategic plans. Having experienced firsthand what works and what doesn't when it comes to long term planning, John and Frank share their insights to help SLDOs face the challenges ahead.

SLDOs enjoy the benefit of hard-working volunteers who populate their committees, leadership and boards. In most instances, the tenure of individual volunteers is limited to a few years; however, the SLDO continues long term. Often, it is the SLDO's executive



director and staff who are charged with ensuring that the SLDO carries forward in an effective fashion after leaders transition away. Long range planning by SLDO board members and leadership can be invaluable in assisting the SLDO with moving forward instead of becoming inert and stagnant. An appropriate plan—whether a 3, 5, or 10 year plan—can move an organization forward—regardless of change in volunteer leadership. The purpose of this guide is to provide SLDOs with a structure by which to create a long range plan, from start to finish.

So why an updated manual? Much has changed since DRI's original manual was released. First, SLDOs face more challenges when it comes to recruiting and engaging members. The financial crisis which hit in 2008 continues to send ripples through the economy and through the legal community in particular. Where other sectors have rebounded, the legal field has not done as well. Law firms, which continue to tighten their belts, often slash discretionary spending for voluntary bar associations. Second, technology has evolved, so that the way we communicate, receive and process information and represent clients has gone through seismic changes. Third, it is an acknowledgement that we are all in this together—DRI and the SLDOs, and opportunities abound and synergies exist wherein DRI can work alongside your SLDO for the organizations' mutual benefit. Those opportunities are addressed in this manual.

It bears noting that this manual goes beyond strategic planning and addresses many of the issues facing SLDOs and suggestions of how to address them. One size does not fit all and not every organization can tackle everything, and certainly not everything at once. Some of the items we discuss will be issues your SLDO will want to discuss as part of your long term planning. Others will be suggestions that you can implement immediately. Our goal is to empower you to maximize membership, engage members, increase revenue and increase value for your members.

## What to Expect from this Manual

In this manual, we will share with you our process for improving your SLDO and making it stronger. We will help you ask the right questions among yourselves and to your current and former members learn about their needs, wants and expectations. We will help you develop and implement a strategic plan to address those needs and wants, and further, address issues you face every day as a SLDO in our current legal environment.



The biggest update to this version of the manual is that it will spell out all the opportunities to partner with DRI. Whether it's doing joint webinars or receptions, coordinating with DRI's substantive law committees or building your own diversity, women in the law or wellness committees and programs, we are here to help.

## Honoring the Past, Planning for the Future

Any organization that plans on changing course must both respect the past and look toward the future. Most SLDOs were established decades ago, and have served the interests of thousands of past and current members. Many members are used to having certain things done certain ways. Some are steeped in tradition. Some are based on inertia. While preserving all the hard work and dedication that has brought the organization to the present day, an organization that does not evolve will stagnate. So, as your SLDO takes steps toward long term planning, make sure that you balance serving the organization's past while reaching out toward its future. *To do that, ensure you have both long standing members and younger members on your planning committee to provide a variety of perspectives.* You want to continue serving your long standing members and meet their needs while reaching out to new and younger members who may have different needs.

## Selecting the Strategic Planning Committee

To create a strategic plan you will need a strategic planning committee. The committee will exchange emails and participate in conference calls to discuss various aspects of the strategic plan and ultimately will attend a retreat to finalize the report and reduce it to writing, from which it will go to the SLDO board for approval and enactment. This document will direct your SLDO's future. So it's important you pick the right team to formulate it.

Two of the reasons that strategic plans fail are, 1) lack of member input or representation in the process, and 2) a lack of "buy-in" by those responsible for carrying out the plan to fruition. The committee should be staffed with these points in mind. Your executive director must certainly be a part of the committee. Current and future SLDO officers, key board members, and other defense bar leaders should also be included as they and the executive director will be responsible for carrying out the strategic plan.

The number of participants on the committee will be influenced by the size of your SLDO, your Board, and your executive committee. The smaller your Board and executive committee, the more you may need to pull from outside those leadership ranks. Ultimately, however, the committee needs to be large enough so that tasks can be assigned, and small enough so that the process can be manageable. The ideal target size of the committee is somewhere between ten and twenty.

Chairs of important committees, especially the Young Lawyers Committee, should be considered, because they are potential future board members and leaders of your SLDO who can carry their experiences forward from the strategic planning process to leadership in your organization. The head of any editorial board for your publications should also be considered. The chairs of your substantive committees may also be good candidates.

Institutional memory is also important. While long-serving executive directors will have a memory of what has worked and not worked for the organization, not every SLDO has such a person. Thus, one or two highly respected past presidents should be invited to join the committee as well. (Indeed, the right past president can actually be a very good chair of the committee).

In summary, your LRP committee should probably be between ten and twenty people, and should consist of the following categories of people:

- Your executive director
- Your officers
- Some of your board members
- A young lawyer representative
- Your publications chair
- One or two past presidents
- Any other rising leader or member who is needed for geographic or other diversity (if your board members are not diverse enough).

## Asking the Important Questions

Before the committee starts brainstorming, they need to learn more about the members they're serving. You will want to ask your members (and former members) some key questions.

The questions fall within the following categories:

### 1. Identity

- Who do we think we are?
- Who do the bar and the judiciary think we are?
- Who are we in reality?
- Who do we want to be?

### 2. Membership

- Why do our members join?
- Why do they remain members?
- Why do they drop out?

### 3. The S.W.O.T. Analysis:

What are our:

- Strengths
- Weaknesses
- Opportunities
- Threats

The above information can be obtained by survey, interviewing, and by group discussions. You can find in the appendix proposed surveys you can use for this purpose. You want to survey your current and past members. You want to know what your current members want and why your former members left. You also want to survey your executive director, current and past leadership, to get their input since they work most closely with the SLDO and its members. You can have the executive director send the surveys by email or have her use SurveyMonkey to facilitate the process. Ideally, the survey responses should be directed to your facilitator or a trusted past president so that members will feel comfortable about being candid in their responses.

The information needs to be collated and distributed to the committee in advance of any conference calls or retreats to start brainstorming the strategic plan. The information will also be instrumental or retreats in setting an agenda for a retreat and in beginning the draft of an outline for the strategic plan.

## Components of a Strategic Plan

Strategic plans come in many shapes and sizes. Some are nothing more than a list of goals followed by action steps for each goal. Some take a deeper dive, and discuss the purpose, mission and

destiny of the organization and explain its path forward. There are no right or wrong ways to draft a strategic plan. For our purposes, we recommend that a strategic plan include:

- **A Mission Statement.** This is a succinct statement of precisely who you want to be as an organization.
- **Goals.** Your plan should have a series of goals that the organization seeks to accomplish within a prescribed timeframe. For a plan to be successful, the list of goals must be succinct and manageable.
- **Strategies/Action Plan.** Under each general goal, you should list the strategies or action plan steps to be taken to accomplish the goal.
- **Implementation Deadlines.** Each strategy or action plan step should have a realistic deadline for the action to be accomplished.
- **Accountability.** Each strategy or action plan step should identify the individuals, officer, committee or group that will be responsible for the action.
- **Budgeting implication.** Each strategy or action plan step should have a statement as to whether it will cost money or make money and how much money will be involved.

In the appendix, there is a form you can use for reducing your strategic plan to writing.

### ***Mission Statements***

Most organizations have discussed what their mission statements are. Who do you want to be as an organization and what you see as your purpose and destiny? These are foundational questions your organization must ask itself before charting its course into the future. If you already have mission statements, ask yourself “are they still relevant and accurate?” If not, discuss updating them. If you don’t have one, have your leadership address the issue.

How does one go about preparing or updating mission statements? Start by looking at other organizations’ statements. See what they value. See how they represent themselves. See how they convey their views. Don’t just look at other voluntary bar association statements. Look at the statements of corporations and nonprofits. Look at your respective firms’ statements. Every organization must never stop asking itself what its mission and purpose is.

The best approach to creating a mission statement is to compile a list of key words that describe the organization and its members. Then, have your facilitator arrange the words into aspirational sentences. The strategic planning committee can then work to edit the draft into an agreed statement.

Mission and vision statements are the first items you tackle when preparing a strategic plan. You cannot move forward as an organization without a strategic plan, and you cannot develop a strategic plan without first defining what your mission is an organization.

### ***Suggested Categories for a Strategic Plan***

The categories for operating a successful SLDO are limitless, but they are very much a factor of the size of the organization, the size of the state or locality, the size and practices of member law firms, the diversity of practice areas, and the financial wherewithal of members. Some categories are common across the board such as membership and revenue stream. Others will depend on your locale and your members' needs. What follows is a list of suggested categories you may wish to address in your strategic plan.

What follows after this section of the book are a wide variety of issues we face as leaders of voluntary bar associations and our collective thoughts on how to address them. DRI wants to walk alongside of you and help wherever possible. To that end, we



provide specific examples about how we can be partners pursuing various opportunities.

The following is a preliminary list of some subjects that could be the basis for goals:

- **Image/Identity.** How is the SLDO perceived? How does the SLDO want to be perceived? How do your publications and activities affect your image?
- **Membership.** Size, types of practice, big firms, small firms, racial/ ethnic diversity.
- **Financial Stability.** Dues, sponsors, seminars, advertising, and other income opportunities.
- **Judiciary.** Rules of court procedure, judicial selection, unjust criticism.
- **Legislative Activity.** Committee structure, lobbying, monitoring, PAC, drafting legislation.
- **Membership Value/Services.** Expert sharing, list serves, publications, seminars, networking, events.
- **Substantive Committees.** Trial Tactics, Insurance, etc.
- **Standing Committees.** Nominations, Awards, Finance, Legislative, Judicial, Young Lawyers, Publications.
- **Education.** Number of CLEs, quality, lunchtime sessions, timing, attendance, etc.
- **Diversity.** Racial, gender, rural, urban, big firm, solo, in-house, corporate.
- **Board Activities.** Terms on board, meetings, districts, at large, attendance, qualifications, orientation.
- **Networking Opportunities**
- **Leadership.** Officer terms, officer selection, responsibilities, orientation, succession, term limits.
- **Website.** Functions, upkeep, blogs, member searches, links.
- **Other Subjects** identified by S.W.O.T. analysis.

### *Considerations for Selecting a Facilitator*

One of the obvious facts of long range planning is that it takes time. SLDO executive directors are busy running the day to day operations of the SLDO and many of them manage more than one association. The SLDO officers are usually busy defense lawyers who may barely have the time to carry out the duties of their offices. Thus, the question of who will drive the process is a tough

one. If the SLDO has an abundance of money, then an outside planning consultant may be the answer. If money is an issue, then someone inside the organization (such as a respected past president) will have to be appointed. Either way, the decision of who to choose is key to the success of strategic planning.

The person chosen by the SLDO to chair the committee (presumably a member) may end up being the driving force and facilitator for the entire process. At a minimum, the chair will be the person who directs the decision of whether to hire an outside consultant.

### *Traits of a Facilitator*

A book could be written on what to look for in a planning facilitator, but the following traits are important:

- Understanding of strategic and long range planning
- The time to facilitate and complete the planning process
- Good organizational skills
- Good listening skills
- Ability to run a meeting
- Ability to mediate among competing views and to obtain consensus
- Preferably some understanding of the activities, challenges, and structure of a bar association
- A general understanding of the finances, technology, and services of a professional not for profit association
- Some knowledge of marketing, membership recruitment, and website design
- Ability to write a workable plan
- Sufficient stature and trust to be respected by the committee
- References

### *Insider vs. Outsider*

There is no “right answer” for whether an SLDO should choose a member or choose an outside consultant to facilitate the process. The decision will be driven by a combination of affordability and the traits listed above.



If an outsider is chosen, then it must be someone who not only has the traits and time that are needed, but also someone who transcends any factions or politics within the organization. More than likely this person will be a successful past president. However, this person could be an energetic board member or an officer.

If the decision is made to go with an outsider, then the decision should be made carefully and only after interviews, reference checks, and careful scrutiny of the fees and expenses that will be charged.

You should feel welcome to contact DRI for names of potential facilitators.

### ***Finding an Outside Consultant***

The following is list of suggestions for finding an outside strategic planning consultant:

- Call DRI. We can refer you to other SLDOs who have done long range planning
- Consult other SLDOs directly. (Reach out to SLDOs that are similar in size to your own)
- Consult with other bar associations
- Poll your members to see if they have used consultants for law firm strategic planning
- Check with other professional associations in your state
- Check with other not for profit associations

DRI and the authors of this manual are committed to helping you develop and implement a strategic plan that, guided by your mission, will provide the blueprint to help you reach your goals. In conjunction with this manual to provide you a guide on strategic planning, DRI will be offering presentations and workshops on strategic planning at upcoming regional meetings and elsewhere.

### ***The Long Range Planning Retreat***

The long range planning retreat should be designed to achieve the highest level of open, candid, and forward thinking discussion. Consequently, planning should incorporate not only the Agenda, but also the atmosphere and attitude that will achieve these goals. Commitment to the event, openness to exploration, and good humor are critical to success of the meeting. This outline addresses important components of the planning.

### ***Choosing the Date and Location***

The date of the retreat should ideally be at or near when the organization would otherwise be holding a board meeting, so as to maximize likelihood that it is manageable on participant's calendars. A date that is at or just before the "opening" of the SLDO's year is ideal, because it sets the tone and framework for accomplishing the goals identified in the session.

Location is possibly among the most important decisions. The setting must be sufficiently removed from the participants' day-to-day routine so as to be conducive to dedicated attention. Hence, choosing the conference room of the SLDO president is probably not a good idea. Rely heavily on the concept of a "retreat"—the idea is to get away from other matters and focus on the business at hand. If the session will be only one day, try a hotel meeting room or local conference center.

If finances will support the effort, an overnight retreat is typically the best opportunity for the committed effort required for a successful session. A hotel, small inn, or similar confined spot in a pleasant, but centrally located place is ideal. The retreat need not be lengthy—consider noon to five one day, followed by dinner, and eight to noon the second day. Costs of the meetings, breaks, and dinner ought to be borne by the organization; room costs and incidentals ought to be borne by the participants (except for the executive director).

All participants should be repeatedly advised of the intent to be totally engaged with the process, with reminders that, absent true emergencies, they should be prepared to come to the session without laptops or cell phones. Emphasize that there will be breaks for contact, but that these items will be banned during the planning session. [The only laptops in the room should belong to the executive director and the person appointed to be the scribe for the retreat.]

### ***Consider a Diversion***

There will inevitably be substantial differences of opinion during the planning session. Airing of these opinions and consideration of them is critical to success. The planning session should be advertised and structured to be as welcoming of comment and interaction as possible. Whether the retreat is one day or an overnight, include some item on the agenda designed to foster collegiality, friendship, and trust building. Some suggestions include—a wine tasting, a cooking demonstration, games, off beat

introductory sessions (tell us something about you that no one would likely guess). The goal is to create the camaraderie that will embolden new and seasoned alike to make suggestions and take comment, without bruised egos or indifference to the process.

### ***The Agenda***

The agenda should be prepared in advance by the strategic planning committee chair and/or the facilitator, having in mind the issues that will likely arise. There are two primary options—the “brainstorming session,” or the “particular issue” session. In the former, the goal is to have the participants identify the areas that most need attention. In the latter, the issues might be known, and the planning session is intended to create means of addressing them. A sample agenda is included in the appendix for a brainstorming session. It can easily be adapted for a specialized issue session. Distribute the agenda reasonably well in advance of the session, with identification of ways the participants can come prepared to engage. For instance, ask them to consider their concerns or goals for the organization, to speak with members about interests or questions, to develop notes or comments about what should be discussed. Encourage conversation with past Board Members for historical context to issues confronting the group. While much of this preparation will have been done by the committee in advance, the committee members should prepare before they arrive.

Regardless of the format of the agenda, always begin with a discussion of the strengths of the organization. Setting the positive tone up front will encourage a more positive outlook in discussion of the challenging issues confronting the group.

### ***Survey Results***

The agenda should provide plenty of time for the facilitator to go over the survey results and to lead a discussion. The survey will be a good lead into a S.W.O.T. analysis.

### ***Logistical Issues***

While the focus of the retreat should be discussion, it is important to record thoughts, ideas, and plans. Hence, a scribe or recording device of some nature is important. Ideally, this should not be someone integrally participating in the session. Make sure that breaks, meals, and all necessary logistics are in place and that there is a designated detail person (again, not one of the

participants) assigned to address any glitches, so that logistics are not a distraction to the proceedings.

### ***The Take-Away***

Establish and identify at the beginning of the session what the end result will be. That end should be an outline of the issues discussed, an identification of the matters that will get further attention, and a specific action plan. The action plan should include assignment to individuals and response dates. Make sure all participants know at the start that each will be expected to have a role and responsibility in fulfilling the action plan.

## **Implementing the Plan—Action Plans**

### ***Strategic Planning Committee Approval of Draft Plan***

Within a prescribed and relatively brief time after the retreat the scrivener and facilitator should provide a clean draft to the committee of the plan that came out of the retreat. A procedure then needs to be in place for written responses from the committee members or a follow up meeting to approve the draft.

### ***Board Approval***

The next and most important step in the process is board approval. The draft should be distributed to the board in advance of a meeting and the facilitator or committee chair should present and explain the plan to the board.

If the plan can be approved on the spot, then it is ready to implement. If the plan needs further editing by the committee, then it should be tabled until the next board meeting. [Note: If any significant delay occurs in ratification of the plan, then implementation deadlines will need to be adjusted in the final plan.]

### ***Taking Action***

Once the plan is approved it should have clear goals, clear action steps to be taken, deadlines, persons responsible, and budgetary implications. At this point the executive director and senior officers must assign the tasks to the accountability persons or committees and get them started. At the same time, the plan should be “marketed” to the entire SLDO membership and should be announced in some form to the legal community.

### ***Accountability***

The best way to keep a plan off the shelf and moving is to have it on the board agenda for each meeting thereafter. Accountable individuals or committee chairs should be invited to the board meeting to report on their efforts and progress. If progress is not occurring then the reasons for lack of progress need to be studied and addressed.

### **Post Planning Role of the Committee**

Many organizations will disband a strategic planning committee after the plan is launched. However, some group of the committee can be maintained for the purpose of monitoring progress. A one year anniversary meeting can be held to assess how the plan has progressed and whether changes need to be made. The committee can then report to the Board or to the membership as a whole on where the plan stands.



## How Do Others Perceive You?

You, no doubt, have an image in your mind of your SLDO. You may think it provides valuable CLE, networking, business opportunities and fellowship to your members. You wonder why more defense attorneys don't join, and for those who do, don't get involved. If others perceived your organization the way you do, wouldn't more join? Wouldn't more volunteer once they did? Perhaps others don't share your perception. It's important to gauge how defense attorneys, both members and nonmembers, see you.

For members and former members, you can ask them in a survey. For those who have never been members, you may want to obtain a sampling of managing partners at firms in your state and gauge their image of your SLDO. Maybe they don't see the value proposition you do. Value is the ruler against which managing partners gauge firm expenses. Will the dues and conference fees for this SLDO be justified by the value membership and involvement provide? These are the questions managing partners ask.

You need to ask defense lawyers who they think you are. What image do they have of your SLDO? Is it positive or negative? Why? What played into their image of you? Is it because they tried to learn more about you and your website was dated, or worse, was barely functional? They spoke with former members who had a bad experience? Is it because your SLDO isn't well known? If you don't define yourself, others will do it for you.

So, to better gauge your image, ask others how they view you. And ask other SLDOs if they have done a similar exercise and ask how defense lawyers in their state perceive them. At the end of the day, who we think we are doesn't matter if others don't share that view.

How others see us will determine if they join our organization and get involved.

## Who Do You Think You Are?

To improve your image in the eyes of others, not only do you have to learn how prospective members see you, but how you see yourself. Again, our perception of ourselves may not be accurate. Perhaps we give ourselves too much credit. Conversely, our view may be accurate, and it isn't the "product" that needs improvement, but the "message." Perhaps, as is generally the case, it is a bit of both.

Ask yourself what you think of when you think of your SLDO. What images come to mind? What impresses you about it? What can be improved? What needs do your members have as defense counsel? Is it meeting those needs? Most of those needs? Some? Just a few? If you could describe your SLDO in a paragraph, how would it read? Be honest. What have you observed or been told that works and what doesn't. What do members like and where is there room for improvement?

As your state's SLDO, you want to be the organization your state's defense lawyers turn to, rely on and seek out to help their defense practices. Compare your description of your SLDO to this standard and see how you measure up. This self-critical analysis will help you improve your image.

## Who Do You Want to Be?

Who do you want to be as a SLDO? The leading provider of defense-oriented CLE? The leading resource for defense counsel? An advocate for corporations on business-related issues? The place where defense attorneys go to defense lawyers and network and refer business and law to one another? The "go to" organization for adjusters and in-house counsel? All of the above? Something more?

In deciding your future, you must reflect on who you want to be as an organization. As lawyers, we each have an image. Each of our law firms has an image. Your SLDO has an image. You can be passive, and let others define your image, or be proactive, and define it yourself. To do that, you have to know what your organization wants to be—who it wants to serve, how it wants to serve them, and what long term goals it wants to pursue and how to achieve them. Who you want to be is a topic to be discussed with your executive director and leadership.

## How Do You Change Negative Perceptions

Defense lawyers may have a negative perception of your organization. They may believe you have nothing to offer them and that you don't add value to their firms. But how did they get this perception? Let's start with your online presence, specifically, your SLDO website. When was the last time it was updated? How does it compare to other voluntary bar association websites? Does your website reflect everything you do? For many prospective



members, especially Millennials, they are sizing you up by your website and an outdated website will turn them off.

In addition to your website, have a more robust presence on social media. Make sure your email blasts, publications and brochures look modern, eye-catching and convey a message in a clear, direct manner. Everything a SLDO puts out to the universe reflects on it and adds to or attracts from its public perception.

The substance of your communication also impacts your image. If your articles and meetings all focus on one practice area, they will define your image. However, if your members practice is a broad array of areas, that should be reflected.

Also, you need to identify your members who are true believers, who are the ones who can't say enough good things about your SLDO, and empower them to be your ambassadors. Have them reach out to prospective members and speak at other local voluntary bar organizations which may have prospective members. As DRI says, membership is personal, and changing negative perceptions can best be done through one-on-one interactions with your most active members.

## Branding—Everything You Do

Everything your organization does contributes to or undermines your image and your brand. Once you know what your brand is—your image based on who you are, who you serve and what you stand for—everything you do must support that brand. That includes everything from the visual—your logo, your type font, your colors, your images, your photos—to what you say—your publications, emails, brochures—to what you do—your conferences, your leadership structure, your meetings, your speakers and subject, and your cocktail receptions—everything, and we mean everything, builds up your brand or tears it down. When improving your brand, consider changes to the following:

- Logo
- Tagline
- Visual design
- Website
- Brochures
- Banners
- Newsletters

- Blast emails
- Publications
- Subject Matter
- Talking points
- Leadership structure
- Committee structure
- Membership outreach
- Community service

An organization's brand takes time to develop and ensure it's right for your organization. It also can benefit from a professional touch. Consider reaching out the marketing personnel at your members' law firms for input or hire a consultant to help you brainstorm and design the various aspects of your brand. A major key is looking professional. Take the time to do it right and if necessary, invest the money to hire professional help.



# Governance Issues

## Selecting Leaders

The future of your organization depends on your leaders. They will define your vision, develop a plan to implement it and do the hard work to bring the plan to fruition. These leaders are members who have been involved, who show up, who do what they promise. They are reliable and pleasant. They buy into the purpose of the SLDO and want to do all they can to make a good organization better, to make a good organization a great one. They have paid their dues, understand the responsibility and sacrifice that comes with being a leader.

Leaders make a difference—a good one or a bad one depending on whom you choose. Consider interviewing members up for leadership positions, and during that interview consider posing the following questions:

- What big idea do you have for the SLDO?
  - What is your plan to implement it?
  - What will be your role to implement it?
- How do you define the term “leader?”
- What type of leader are you?
- How do you plan to increase membership?
- How do you plan to get members more involved?
- What additional sources of revenue can the SLDO pursue?
- What will be your commitment as a leader?

You want big picture thinkers who still sweat the details, those who want to make big things happen but understand budgets and the constraints they impose.

## How Are Officers and Board Members Chosen

Before selecting your leaders, consider doing the following:

- Define the responsibilities of the position in writing, including the out of pocket cost, the expected travel, attendance at meetings, an estimate of the time commitment, and the tasks involved. Being honest of what the position entails, both the positive and negative, both the benefits and pitfalls, is important in separating those who want the position and those who are committed to it.

- Have a nominating committee interview the candidates. Seek the input of your members and ask them to speak or write to the committee. You want to learn as much as you can about the candidates before choosing one or more of them.
- Be open about the process. Make the selection process—everything from submitting one’s name for consideration, to the interview process to how leaders are selected—as open as possible.
- Focus on the right things. Pick leaders who have dedicated themselves to advance your organization.

And for those who don’t make the cut? Keep them involved and make the most of their talents.

## How to Choose Committee Chairs

SLDOs often choose their board members from their committee chairs, so when choosing them, you must ask yourself whether the person seeking to be a committee chair can one day fill the shoes as a board member? If the answer is no, then you should pass on that candidate.

How you choose committee chairs will depend on how vibrant, involved and large your committees are. Choosing the chair of a new and small committee will be different from choosing one for an established and large committee. For new or struggling committees, you may want your board to handpick the leadership. For a larger committee, you may create a protocol where prospective chairs must hold various positions in the committee before advancing to chair. Perhaps to be chair, one must take turns being in charge of the committee’s publications, membership, online presence and substantive meetings.

As with any leadership position, your association should provide clear guidelines on the expectations for and experience necessary to become a committee chair. Again, the board may be best to choose the leaders of the larger more active committees as long as members of the committee are allowed to provide input into the selection process.

## Qualities of a Leader

A lot has been written about leaders. Different folks have different views on the qualities of good leaders. The following is our proposed list (in no particular order):

- Reliable
- Visionary
- Consensus builder
- Effective communicator
- Servant-oriented
- Ethical and trustworthy
- Professional
- Selfless
- Humble
- Strong work ethic
- Long term thinker
- Frugal
- Good manager
- Members' good will
- Sense of humor
- Finger on the pulse of the legal profession

This is not meant as an exhaustive list. But it is meant to show that leaders have a skill set to effectively lead your organization. Make sure to inquire about these skills during the selection process.

## Terms and Turnover for the Board

When deciding on terms for your board members, keep in mind that you want them to serve long enough to make an impact and you want to ensure that at any given moment, you have a good mix of more experienced and newer board members. You want terms to be spread out, so every year you have new board members rolling on as more experienced ones roll off. Many SLDOs have chosen to have three year terms for board members.

Whatever the terms, make sure there are term limits and make sure that on any given year, as new board members come on, most of the existing board remains on as well for consistency and long term planning. Many SLDOs will allow a term to be renewed one to two times. Infusion of new blood coupled with experience will provide a good mix of tradition, stability and new ideas.

Your selection process should be included in your bylaws and should be explained to your members.

## Corporate Structure and Review of Bylaws

If your SLDO hasn't reviewed its bylaws in a while, it should. You may find the requirements to serve on the board are dated and prohibit many qualified members from pursuing a board seat. You may find the requirements for board members no longer applicable based on changes to your organization and who it represents. You may want to change the descriptions and responsibilities of the various officers and board members to provide greater clarity as to who does what. You may want to change the number of terms a board member can serve and the length of those terms. You may want to examine whether your process for board selection works to provide broad, diverse, and geographically fair representation.

Consider having a committee periodically review the bylaws and offer proposed changes to the board. How your leadership is set up and the expectations imposed upon them will direct your organization—for the better or worse. So make sure your corporate structure is laid out so everyone knows their responsibilities and regularly review that structure so as to make changes when necessary to encourage members who may otherwise be overlooked for leadership roles to seek out those roles.

## Leadership Structure

Different organizations have different leadership structures. A typical structure will be a president, president-elect, secretary/treasurer and board of directors. Others an immediate past-president add one or more vice presidents. Some have a handful of board members. Some have many. There is no right way of structuring your leadership, but keep in mind the following caveats:

- The more leaders, the more hands you have to take on projects. Conversely, the more leaders, the harder it is to reach consensus.
- The longer the path to become president, the more experienced your leaders will be when they become president. Conversely, the longer the path, the greater the commitment you will be expecting from your members.

- By getting diverse and young lawyers into leadership positions, you bring new perspectives and views. Conversely, you will be shaking up the status quo.
- By seeking prospective board members from different geographic areas, practice areas, and firm sizes, you increase representation for some of your members but decrease it for others.

Determine what your association's needs are and construct a model to meet those needs. For those constituencies who are not fully served under the model your association chooses, find other ways for the organization to meet their needs.





# SLDO Committee Structure

## Substantive Committees

Your members want to improve their knowledge and skill set in their specialty areas. They want to stay ahead of their opposing counsel when it comes to knowing changes to the law, procedure and practice skills. They want to learn from and interact with other like-minded lawyers, with similar practices, to discuss strategies, ideas and trial themes. So having substantive law committees that offer live programming, webinars, articles and networking opportunities, is an important facet your SLDO can use to engage your members.

For those SLDOs who don't have substantive law committees, start with one or two. Interview your leaders and survey your members to determine which one committee would be best received and likely be most successful. Most SLDO's will start with Trial Tactics and Insurance Coverage. Both substantive areas can encompass most of the practice areas of your membership.

If you have solid activity and engagement from your existing committees, then explore other popular practice areas and slowly create new committees.

## Planning Committees

In addition to substantive committees, your SLDO may have planning committees that are in charge of events, conferences, webinars or publications. They have a specific task to plan for and accomplish, and that task may be yearly, quarterly or monthly. For example, you may have an annual meeting planning committee, with subcommittees responsible for CLE, food, entertainment and networking. Whenever undertaking a large project, whether it's a regular project or a one-off project, have a committee with leadership focused on the task at hand which can assemble a team to get the job done. Any large scale project requires a team, led by a leader, to ensure it gets done right.

Planning committees do the thankless work that goes unnoticed—ensuring publications go out on time, choosing speakers that are both captivating and informative, marketing events—and picking the right folks, assigning them tasks and holding them accountable will make your SLDO successful. It is from committees like these that you will find your future board members and presidents.

## Specialty Committees

Specialty committees—whether young lawyers, women in the law, diversity—create opportunities for SLDOs to attract and

involve underserved member groups. SLDO leaders debate who to recruit and engage more millennials, women and diverse lawyers. These members have needs, want a voice, and want to be part of something bigger. But historically, in defense organizations, they haven't felt welcomed or believed defense organizations met their needs. Creating specialty committees acknowledges you're trying to get new and underserved members involved, engaged and served.

Before starting specialty committees, reach out to DRI and other SLDOs who have such committees for input on how they did it. In fact, DRI has brochures on how to start your own diversity and women in the law committees. You can find these resources at [www.dri.org](http://www.dri.org). If your long term plans involve starting multiple specialty committees, start with one; learn from starting that one; and, use what you learned to roll out the next one, and so on. Remember, don't bite off more than you can chew.

## Standing Committees

Like any organization, yours will address various administrative issues, whether its budgetary, negotiating a long term lease, hiring staff, etc. Since many of these decisions require board approval, as opposed to dropping the entire process in the board's lap, administrative committees can be formed to do the due diligence and ground work on such issues. Maybe it's the annual review of insurance policies for the organization. Perhaps drastic changes need to be made to the budget. A committee can do the lion's share of the work and ensure the relevant issues are being addressed appropriately.

A list of standing administrative committees may include, finance, nominations and awards and nominations.

Many SLDOs will also have committees to assist the SLDO in professional issues. Those committees can be legislative and courts.

## Special Events

If your organization is celebrating its 50th anniversary, wants to publish a book or wants to start a charity, you'll want to develop a committee to investigate, evaluate and propose a plan to pursue a special event, plan or project. Committees provide a forum to discuss and debate the best way to tackle a large, new project, which requires imagination, hard work and long term planning. When tackling a big project, select a committee to help shepherd it through. The committee should typically be chaired by an officer.



## Sources of Income

For SLDOs to thrive and grow, they need a regular, steady income stream. This income derives from membership fees, meeting fees, CLE, sales of publications and sponsors. Every SLDO must maintain or increase membership and attendance at its events to grow its current revenue stream while developing new revenue streams. What made you money five years ago may make you less money today, or worse, makes you no money at all. A once popularly attended annual event, has seen attendance deteriorate to the point of it evolving from a profit center to a loss leader. The annual meeting that attracted 150 members in its heyday, barely attracts 50.

Every SLDO has to study what's making it money, making it less money or making it lose money and see what changes can be made to reverse any downward trends. Simultaneously, the ways attorneys network, fellowship, receive CLE, and meet clients have changed, and that means your SLDO has to change and create new opportunities, such as webinars or local meetings, for example, to create new income streams. The legal services landscape is changing. To survive, you'll need to change with it.

## Expenses and Budgeting

Every organization should regularly review what expenses it can reduce or remove altogether. For SLDOs, one large line item is the cost of publishing hard copies of newsletters, magazines, brochures, etc. A quick and relatively pain free way to reduce costs is to offer publications, notices and brochures via email in a PDF or related format and get rid of most if not all of your hard copy publications. Alternatively, you may want to keep publishing in hard copy your flagship magazine but eliminate all other paper. Going paperless (or close to it) is very cost effective.

Another cost cutting measure is to alter the food and refreshments you offer at events or change the locales of events. Perhaps you have a deposition boot camp for young lawyers, but you're having a hard time breaking even. Instead of renting a conference room, see if one of your members has a large conference room they can offer for free. Once you do that, you no longer are stuck paying hotel food and beverage prices and can order from a local deli. These events can also be inadvertently "sponsored" by a member law firm or a friendly vendor.

Maybe you can get a better deal on insurance? Your next long term lease could be less? There may be other third party vendors who can give you better deals of office equipment, printers and copiers, IT services, etc. Reach out to the firms your leaders belong to and they can share their insight on how they have reduced costs at their respective firms. Some of their cost cutting measures may provide you with insight to cut costs at your SLDO.

It should go without saying, but a realistic budget should be prepared at or before the beginning of a new year. The budget should be a regular agenda item for executive and board meetings. The strongest SLDOs stay true to their budgets through good stewardship.

## Developing New Revenue Streams

It's easy to say, "develop new revenue streams." Who doesn't want to develop new revenue streams. Here are a few suggestions:

- **Webinars:** They're inexpensive to put on, they're popular with young lawyers, and with adequate marketing, can each make your organization thousands of dollars.
- **Young Lawyer Training:** If held at member law firms, with minimal food and refreshment expenses, even moderate attendance can be profitable.
- **Publications:** E-books written by your members can be prepared with minimal staff labor and can be sold to your members.
- **Sponsors:** Having a vendor sponsor an event, a publication, or other item is easy money which costs your members nothing. You can sell advertising space on your website, books and other publications. You can set up vendor exhibits at your meetings.
- **Dues Increases:** SLDO dues are notoriously low and often are not increased for years. You must explore the possibility of dues increases every three years or so.

Among these suggestions, gaining sponsor support and pricing it appropriately is the best revenue source. You should speak to DRI and to other SLDOs to gain insightful information on how to do it.

## Insurance

Whether its liability, directors and officers, workers' compensation, health or other insurance, your SLDO should have regular communications with the SLDO's insurance agent to explore opportunities to reduce insurance costs with other insurers and other policies. And if your agent isn't responsive, check with your leaders' firm's insurance agents to see if there are better deals to be had.



# Giving Your Members What They Want on Their Terms

Your members primarily want two things from your organization—education and networking. They want to become better defense lawyers and they want referrals from other members. But they want to improve their practice and their client base on their terms. When it comes to education, they want more education at their fingertips, through webinars, publications, social media posts and other means. For clients, they want more opportunities to network with potential referral sources, in order to develop relationships with them and become their trusted friends and advisors. To do that, you want to create more avenues for your members to network in their backyard and to meet in-house counsel, who are often skittish to attend events where they feel like chum in open water with sharks. Creating opportunities for members to meet prospective clients will provide a benefit many defense lawyers will pay for.

## Continuing Education

The face of CLE is changing. More companies are offering it, more are offering it online and more are offering it for less. There are several groups who will provide all your CLE needs for a reasonable flat fee and provide quality offerings. To break through, your organization needs to provide CLE geared toward your members—making the best defense lawyers possible—at a reasonable cost.

On site CLE, as part of a larger conference, remains popular, but online offerings are the new wave and may soon become the norm of how lawyers secure their CLE. Whether it's on computers, laptops, tablets or phones, more and more lawyers are accessing CLE when and where they want for less. If your organization wants to continue making CLE as part of its income stream, and wants to increase this income stream, provide more online content, and bundle webinars and on demand programming, to sell CLE packages to your members. A lot of civil defense organizations are late to creating this platform and there remain opportunities for your organization to take advantage and fill that void.

## Business Development Opportunities

A significant reason a lawyer gets involved in a voluntary bar association is to develop referral sources. Many lawyers join your organization believing they can develop business by joining and getting involved. You have to create those opportunities and

market them to your members. One is creating events where members can network. Another is creating online forums for them to network. Another is creating new and exciting opportunities for them to network. In other words, you want to create opportunities for your members to get to know one another, develop personal relationships, and become one another's referral sources. Creating opportunities can come in the form of lunch and learns, happy hours, receptions sponsored by members, and other avenues where you create the venue and members incur a modest cost for access to other members.

Also, more and more, members are looking for access to in-house counsel and adjusters who can refer matters to them. Evaluate what you're doing to recruit more in-house counsel and adjusters as members, either through discounts, perks or other avenues to get them to join, attend and get involved. Associations with large in-house counsel contingencies, that care and feed those members, are doing great. Emulate them.

## Providing Information

Equipping your members with information they can use adds value to their membership. Do you have an expert deposition database? A database of regularly filed defense motions? How about orders granting those motions? Regular case law updates? What information are you providing your members they can't get elsewhere?

Do you have a listserv where members can share names of prospective experts to hire and impeachment materials on Plaintiff experts? And a more basic question: have you asked your members what information they want and are looking for? Information gather and dissemination should be an integral part of your organization. Reflecting on what information should be gathered, who should be responsible for gathering it and how it should be distributed should be part of your organization's long term planning.



# Membership

## Who Is Your Target Audience?

When pursuing new members, you have to ask yourself, “Who is our target audience? What “members” are we trying to attract?” What defense practices? What experience levels? What geographic locations? What firm sizes? One size doesn’t fit all, and focusing too much on one group discourages other groups from joining. Let’s say all your advertising, all the covers of your magazines and journals and all your brochures have pictures of car accidents. You’ll attract attorneys who defend auto negligence matters, but you might dissuade lawyers in other practices from joining, because they believe all you do is cater to auto negligence lawyers. So, when targeting members, consider the following steps:

1. Identify your prospective audience
2. Ask a sampling of them what they want
3. Gear your programming and marketing toward what they want

Don’t try to guess what Millennials want, or what employment lawyers want or what lawyers at big firms want. Ask them. Prepare a survey, send it to a sampling of folks from different prospective





member categories, summarize your findings and devise a plan to give them what they want.

## Why Do Members Join

Why did your members join? Ask them. You'll probably get an array of responses that include the following:

- Because, "It's the right thing to do."
- Someone asked me
- My firm told me to join and paid for it
- CLE
- Publications
- Conferences
- Practice pointers
- Information relevant to my practice (*i.e.*, experts and brief banks)
- Networking
- Fellowship
- Friendships
- Business development
- Leadership opportunities
- Writing and speaking opportunities

Tabulate your survey results. Determine the top five reasons that your members joined and focus on improving those facets of your organization. If it's making them better defense lawyers, gear your CLE, publications and speakers toward that. If it's business development, create more networking opportunities. Give your members what they want on their terms.

## Why Do Members Stay

Members stay because their expectations are being met. They want relevant, timely CLE and they got it. They wanted business development, and they've had several matters referred to them by other members. They wanted a forum to discuss defense issues, and they're active on your listserv, meeting and communicating with like-minded members with like-minded needs.

If you promise, you have to deliver. If you sell your organization as one where members can meet prospective clients and referral

sources, and bring back new clients to their firms, and that doesn't happen despite their best efforts, they'll stop paying their dues and quit. If you promise the best CLE, but your speakers or topics are lackluster, they'll leave the organization. Getting members to stay is simple—give them what you promised. Think through how your organization can better keep its promises to your members.

## Attracting New Members

So how do you get recruit new members? There are the basic marketing tools—an inviting website, social media outreach, compelling marketing materials. There is also the substance—having something valuable to offer—training and potential referrals. But many organizations have both—something to sell and a sleek way of selling it. So how does your organization break through the noise? Your members.

It is your members who will attract new members. They will be your ambassadors. They will be your marketers and sales persons. They have stories to tell—why they belong to your organization, what it means to them, how it has changed them, made them better defense counsel, made them better trial lawyers.

Identify those members with stories and more importantly, those who want to share them. Recruit those members and have them tell their stories and share them on your website, publications and marketing materials. And more importantly, ask them to pick up the phone, call their colleagues who are not members, and share their stories with them. Everyone loves a compelling story. When non-members hear their stories, some will join. More than you think.

## Membership Drives

Membership is the life blood of your organization. Attorneys will retire and leave your organization. Some will change practice areas and leave. Others will leave the practice and leave. Some firms will cut reimbursement for membership fees, some attorneys will cease to be involved, and some will lose interest and stop paying dues. These members need to be replaced with new ones.

Just to break even, your organization needs to sign up enough members to make up for these losses. To grow, you have to recruit even more new members. So your membership committee must be loaded with your most energetic, outgoing members, who have

a plan to recruit new members and have the resources necessary to achieve their goals. Membership has to be a priority. Gone are the days when new members joined your organization in droves on their own accord. They need a gentle push, a bit of persuasion, and a personal touch to help them see why they need to join in your organization and get involved.

## Activities That Address Many Members

When meeting your members' needs, choose projects that serve and engage the most members with the least amount of cost and effort. If a proposed project will only serve a small contingent of members, you have to ask yourself what will it cost in dollars, staff hours, and volunteer hours? You want to direct your resources where you will get the most bang for the buck. When evaluating a new proposal or idea, weigh the cost against the return in terms of the number of members who will be served, engaged and benefit from it.



# Websites and Technology

## Tomorrow's SLDO Today

More and more, prospective members are going to judge your organization by its website. We are all surgically attached to our smart phones and tablets, and through them, we look up organizations' websites and interact with them through their websites. This is especially true of Millennials who are the future of your organization. Going beyond your website's design and look, go through your website's features:

- Can members pay their dues, attendance fees, and publications through your website? Can they register for events through the website?
- Can members view and download webinars, on demand programming, and podcasts from your website?
- Does your website offer online communities, listservs, and other opportunities for your members to communicate with one another?
- Are your publications and prior CLE papers on your website and word searchable?
- Is your website linked to your organization's social media pages such as Twitter and Facebook?
- Are there opportunities for sponsors to advertise on your website for a fee?
- Are expert witness bios and brief banks available?
- Is the website easy to navigate?
- Do members have a place to offer a complete personal bio?

These are a few things to keep in mind when updating and upgrading your website. The cost of website design has gone down and it's an investment that will return dividends in terms of more paying members and greater registrations to events. Your website is a portal into your organization and a reflection of it. A dated website with little or no functionality will cost you members.

## What Changes Have Occurred?

The way that lawyers access information has changed. The manner in which lawyers learn about their practice and improve their skills has changed. No one uses paper anymore. Everything is via email or online. Lawyers interact less in person. More and more, they do it via video conference, teleconference, or online. Lawyers want



their information up to the minute, immediate, easy to access, in bite-sized pieces and readily available. Lawyers have become more savvy consumers when it comes to joining and participating in voluntary bar associations, expecting more for less, just as we consumers expect more channels, more news, more programming, more music—more stuff overall—for less and in less time. Voluntary bar associations that view their members as consumers, meet them where they are, and give them what they want on their terms, are the associations that will grow and prosper. Gone are the days members will come to you. The day has come that you have to go to them.

## What Changes Will Occur?

More and more, your members are going to interact online, so your website has to be geared toward and accommodate for this. Some things to keep in mind:

- Creating online forums for your members

- Creating opportunities for members to exchange ideas
- Creating online content
- Creating “Ted Talks” by and for your members
- Going to a subscription based service ala Netflix for your CLE
- Creating one stop shopping on your website for all your members’ needs

Why can’t your SLDO become the legal equivalent of Facebook or LinkedIn or Twitter or something completely new and different? Why can’t it become the Netflix of CLE providers? Why can’t your website be the “go to” website for legal news? Case law updates? Practice pointers? Skills training? Go beyond how voluntary bar associations are using their websites now, and think about how they’ll be using them 10 and 20 years from now, and do that now.

## Current Website Status

Before you improve your website, take stock of what you have? How does it look? What can it do? What are its functionalities? How accessible is the content? How much content is there? How relevant and useful is the content? Look at other voluntary bar association websites and study their look, design, content, accessibility and features. And then go to your web design company and see what they can do to improve your site and at what cost, and comparison shop.

Ask other voluntary bar associations and law firms what web designers they use, their cost, their responsiveness, and the pros and cons working with them. If you’re going to make one major investment in your SLDO this year, spend the money to modernize your website.



# Programming

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## Educational

SLDOs are in a unique position to provide civil defense oriented CLE to civil defense lawyers. How to defend a case—whether auto, products, premises, employment, etc.—whether it is the relevant procedures, statutes, cases or strategy, is something your organization is uniquely qualified to teach. A complaint about CLE is that often it's too general, too generic, and not geared toward the defense practice. By surveying your members and recruiting some to speak and present, you will choose the topics relevant to them, on their terms, and have speakers who have dealt with the issues with which they are dealing.

## Skills Based

Many firms don't have the resources to provide skills based programming for their associates. Whether it is deposition or trial skills, many small and medium sized firms can't create their own in-house training programs, and they and their associates are starved for programming that will teach these fundamental skills. Skills programming can include:

- Deposition boot camps
- Trial skills programs
- Jury selection programs
- Writing workshops
- Technology at trial workshops
- Advising clients' workshops
- Negotiation and case evaluation workshops

There is a wide variety of workshops, boot camps and programs you can put together for your members. They take time, planning, and resources, and because of their expense and time commitment to members, they require marketing to convince defense firms to send their associates. But they offer key benefits to your members and can become the crown jewels of your organization.

## Law Firm Management Training

Law firm management committees, seminars and conferences have become more popular as the practice of law continues to evolve in light of technological advances and upheavals in the economy. Whether its business development, strategic planning, firm profitability, associate training, succession planning, or a

host of other topics, many lawyers are looking for training for the business side of the practice which they never learned in law school and have been learning through trial and error at their law firms. It's another way of offering value to your members.





# Publications

## Substantive Publications

“How to” guides, practice guides, and substantive manuals are all publications your SLDO can publish and disseminate to your members. To reduce costs, publish only e-books, not hard copies. Also, have a publications committee that vets book proposals and work with authors to edit and format their work for publication. Releasing your own books is a time consuming process, but can be quite rewarding for the SLDO and your publications can serve as marketing tools to recruit new members, especially if you offer them to free to prospective members as an incentive for them joining your organization. If you can create the definitive guide on taking a deposition, or picking a jury, or cross examination of an expert, you will gain exposure to the defense bar and increase your visibility.

## Quarterly or Monthly Publications

You need regular communications with your members, either through a monthly or quarterly publication, or both. Publications can be general, or they can be published by your substantive committees. You want to keep them informed of upcoming events, accomplishments of your members, case law updates, and legal issues that affect them, their clients and their practices. This may be the only interaction some of your members have with your organization, and it is the gateway to get these members and others more involved and more engaged. Items you may want to include in your publications are:

- Upcoming events
- Photos of recent events
- Members' accomplishments
- Case law updates
- Practice pointers
- Regular law related columns
- New bills in the legislature
- Ads (they pay the bills)

Creating journals that your members read and share helps promote your organization.



# Public Policy Positions

## Who Is the Organization Serving?

If your organization is going to take a stance on any issue—whether it’s judicial independence, or funding for the judiciary, tort reform, or any number of items, you need to first ask yourself—Who do we serve? Who are our members? What are their interests? Do they want us getting involved? If so, getting involved in what? What issues would they prefer we avoid? Just defense oriented issues? Other legal issues? Social issues? Your leadership has to decide which issues, if any, it wants to venture into, what positions to take, how to take them and how to allow your members to get involved.

Many of your members’ clients may want your organization to take positions. Pursuing public policy issues, taking sides and sticking your neck out may be what your organization wants. Then again, it may not. These issues require thought, discussion and debate, analyzing the pros and cons.

## How Is the Organization Affecting Policy

If your organization is going to take the plunge and venture into one or more public policy issues, there are different things you can do:

- Amicus briefs
- Fundraising/contributions for causes
- Informing your members
- Writing decision makers, including legislative bodies, and those in executive branches
- Writing a white paper
- Advertising
- Op Ed pieces
- Coordinating efforts with other organizations

Advocating on behalf of an issue or cause takes passion, time and resources and before committing to it your organization needs your members’ buy-in.



# Fundraising

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## Purpose of Fundraising

If you want to give back to the community, or want to start a scholarship fund or raise monies for speakers, then you need to fundraise. Making an impact often costs money, and your membership and conference fees are likely already committed, so you'll have to think of ways to raise money without overextending your members. There are a lot of worthwhile causes and there are a lot of ways to raise money for them. To start, establish a fundraising committee.

## Fundraising Committee

Consider creating a committee to recommend what to fundraise for and how to fundraise, and once their recommendations are green lighted, empower them to fundraise. Doing good is something many members are looking for, and creating an outlet for that interest will help attract and engage members. A few fundraising ideas include:

- Silent or live auctions
- Raffles
- A dinner or reception where a portion of the proceeds go to charity
- A food, toy or clothing drive
- Raising awareness by participating in other fundraising events
- Creating a scholarship fund
- A “check off” on the member dues statement
- A memorial or tribute campaign for past leaders

There are many approaches to fundraising and many ideas on how to use the funds you collect. Having this social awareness component to your organization will fill a niche that other organizations aren't offering.



# Collaboration with DRI

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DRI is a great model for how a successful voluntary bar association should work and operate. DRI seeks to be generous with its resources and time to help SLDOs grow and provide more avenues to collaborate together. Joining forces with DRI provides your SLDO to grow your membership and revenue streams and forges a closer relationship between your organization and DRI, which is mutually beneficial. Here are some ways you can work with DRI for your collective best interests:

## Partnering Together

Ask yourself, what are items our SLDO can join forces with DRI, where we share the expense and profits, share the workload and the benefits? DRI is not looking to co-opt your SLDO as your SLDO is not looking to co-opt DRI. There are certain things you do well and certain things DRI does well, and partnering together can make the most of what each organization does well to better both organizations. When preparing your strategic plan, consider what opportunities there are to partner with DRI.

## Membership

Consider joint membership drives, where you work with DRI to help one another improve your respective membership. Perhaps it's through emails, or publications, or free offers, or at events. Brainstorm how your SLDO and DRI can work together to increase each other's member rolls.

## New Revenue Streams

In addition to memberships and conference fees, there are other opportunities for your SLDO to make money and to do so in conjunction with DRI. Perhaps one of the following:

- Joint webinars
- Joint publications for sale
- Joint CLE presentations
- Joint skills programming

## Development of Substantive Law Committees

If your SLDO is struggling developing substantive law committees, consider partnering with DRI to help establish your substantive law committees and help them grow theirs. Perhaps there are joint projects, meetings, seminars, CLE's or webinars your substantive law committees can work on together with DRI's substantive law committees. Perhaps each organization's substantive law committee members can attend the other's substantive law committee events. There are many opportunities to work together and cross pollinate.

## Development of Diversity and Inclusion Committees

DRI's award winning Diversity and Inclusion Committee is worth emulating. If you either don't have a diversity committee or are struggling with one you do have, partnering with DRI to better serve your diverse members and extol the benefits of diversity to all your members is worthwhile. Clients expect their outside counsel firms to be diverse, and firms are looking for advice on how to diversify their ranks and better serve their diverse counsel. DRI can share with you how they did and work with you to create opportunities for both your diverse members and for DRI's diverse members to network and refer matters to one another.

## Development of Women in the Law Committees, Young Lawyers, and DRI for Life

As with the DRI Diversity and Inclusion Committee, you can follow DRI's lead and seek their guidance and assistance with developing and growing your own Women in the Law, Young Lawyers, and [SLDO] for Life (geared toward the wellbeing of your members) committees. Not only can DRI help you put into motion, but you can work with them on joint opportunities for your female and young lawyers to meet, network, and fellowship.

## Online and On Demand Programming

Joint webinars, on demand programs, and podcasts with DRI, where DRI and your SLDO share the cost and proceeds for online CLE can create a vibrant and new income stream for your SLDO.

## Website

DRI can advise your SLDO how you can improve your website, making it look better and be more user-friendly. There are opportunities to place more content on your website and attract more members through it.



## What Does the Future Hold?

Voluntary bar associations can't continue doing what they have traditionally done and expect to continue to grow and prosper. Those days are gone. SLDOs like yours need to reflect on the future—your mission, your goals, your plan—and develop a strategic plan to face the challenges ahead. From all of us at DRI we wish you the best on the journey ahead. What a journey it will be.



# Appendix

The following are forms SLDOs are welcomed to use in developing their strategic plans. They include surveys for:

- Past Presidents
- Current Members
- Past Members
- The Executive Director
- Current Leadership
- Other SLDO Executive Directors

They also include:

- Proposed Schedule for a Strategic Planning Retreat
- Sample Goals

## Past President Survey

Dear Past President of \_\_\_\_\_,

For \_\_\_\_\_ to move forward, we want to revisit our past. You played an integral role as one of our Past Presidents in serving our members and our mission. To continue to serve our members, we are embarking on developing and implementing a strategic plan. To do so, we are surveying our current and past members to improve our organization. As a Past President, you have a unique insight of what we do well as an organization and what we don't, where our focus should lie and where we should avoid treading. We ask that you complete the following survey and return it to, \_\_\_\_\_, via e-mail: \_\_\_\_\_. She will summarize the responses and not share individual names or answers with anyone. Please respond as soon as possible but no later than \_\_\_\_\_. Thank you.

### **Your Presidential Term**

1. What was your vision for the organization?
2. How successful were you in implementing it? Explain.
3. What were you most proud of during your term as President?
4. What, if anything, did you want to accomplish, but did not? Why?
5. What were the biggest challenges you faced as President?
6. What were the biggest challenges the organization faced?
7. What did the organization try during your term that did not work? Why?



### **The S.W.O.T. Analysis<sup>1</sup>**

1. Please identify the strengths of our organization and elaborate on them.
2. Please identify the weaknesses of our organization and how we can address them.
3. Please identify the opportunities that exist for our organization and how we should pursue them.
4. Please identify the threats facing our organization and how we can minimize or eliminate them.

## **Membership Survey**

Dear Member of \_\_\_\_\_,

As a current member of \_\_\_\_\_, we want your input as our leadership develops a strategic plan to better serve members like you. Your thoughts are important to us, and we would appreciate if you would take a few minutes to respond to the following questions by \_\_\_\_\_. Your responses should be directed solely to \_\_\_\_\_, at her e-mail: \_\_\_\_\_. She will summarize the responses and not share individual names or answers with anyone. Thank you.

1. How many years have you been in practice?
2. What is the size of your firm?
3. In what city is your office located?
4. What type of cases do you handle?
5. Why did you join our organization?
6. Why do you remain a member?
7. What do we do well?
8. What could we do better?
9. What additional activities, initiatives, or changes should we be doing?
10. What big idea do you have for us?
11. Are you willing to take the lead to make your big idea a reality?
12. What other comments or suggestions do you have for us as we pursue this strategic planning process?

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<sup>1</sup> SWOT Analysis is a framework for analyzing an organization's strengths, weaknesses, opportunities and threats.

## Past Member Survey

Dear Past Member of \_\_\_\_\_,

As a past member of \_\_\_\_\_, we want your input as our leadership develops a strategic plan to better serve our members. We want to learn more about why you left and what it would take to make you and others like you join again. Your thoughts are important to us, and we would appreciate if you would take a few minutes to respond to the following questions by \_\_\_\_\_. Your responses should be directed solely to \_\_\_\_\_, at her e-mail: \_\_\_\_\_. She will summarize the responses and not share individual names or answers with anyone. Thank you.

1. Why did you leave the organization?
2. What would have kept you in the organization?
3. Did the organization change during your membership?
4. How did it change?
5. How did that change affect your membership?
6. What could the organization do to cause you to join again?
7. What are you looking for in a voluntary bar association?
8. What would you want the organization to do differently?

## Executive Director Survey

Dear \_\_\_\_\_,

We thank you for our service to our organization. Your dedication, energy, focus and attitude have assured our continued success. We are always looking to improve upon the services we provide our members and explore new opportunities to serve them better. To that end, if you can complete the following survey and e-mail your response to \_\_\_\_\_ at \_\_\_\_\_ by \_\_\_\_\_. Thank you.

1. What are the organization's strengths?
2. What are its weaknesses?
3. What does the organization do well?
4. What does it not do well?
5. How could the organization improve?
6. How can the organization help you with your duties?
7. What training, if any, would you like the organization to invest in you?

8. How can the organization help you reduce your administrative duties so you can focus on more substantive duties? (For example, what computer programs would make your job easier)?
9. What do you believe the organization's goals should be?
10. How should we achieve them?
11. How do you believe your role should change, if at all?
12. Please identify the strengths of our organization and elaborate on them.
13. Please identify the weaknesses of our organization and how we can address them.
14. Please identify the opportunities that exist for our organization and how we should pursue them.
15. Please identify the threats facing our organization and how we can minimize or eliminate them.

## Current Leadership Survey

Dear \_\_\_\_\_,

As you know, our organization is embarking on developing and implementing a strategic plan to guide the organization into the future, and you will be playing a key role in that. We are conducting our strategic planning retreat on Friday \_\_\_\_\_ from \_\_\_\_\_ am to \_\_\_\_\_ pm and on Saturday from \_\_\_\_\_ am to \_\_\_\_\_ pm at the offices of our current President, \_\_\_\_\_, which is located at \_\_\_\_\_. Breakfast and lunch will be served on Friday and Saturday and reservations will be made for dinner Friday night. In preparation for the retreat, we ask that you complete the following survey and return it to \_\_\_\_\_ by \_\_\_\_\_. Thank you.

1. What should our organization's mission be?
2. What should be its vision?
3. What are its values and principles?
4. What should be its tagline?
5. What should be its goals for this year?
6. Next five years?
7. Next ten years?
8. How do we attract new members?
9. How do we bring back old members?
10. How do we better serve our existing members?

11. What one big idea would you like the organization to implement?
12. How could we make that idea a reality?
13. What do we do well?
14. What do we not do well?
15. What do you hope a strategic plan will accomplish?
16. Please identify the strengths of our organization and elaborate on them.
17. Please identify the weaknesses of our organization and how we can address them.
18. Please identify the opportunities that exist for our organization and how we should pursue them.
19. Please identify the threats facing our organization and how we can minimize or eliminate them.

## Survey of Other Executive Directors

Dear \_\_\_\_\_,

Our organization, \_\_\_\_\_, will be preparing and implementing a strategic plan. As part of that plan, we are asking other organizations, such as yours, regarding their best practices. To that end, we ask that you complete the following survey and e-mail it to \_\_\_\_\_ at \_\_\_\_\_. We thank you for your cooperation and feel free to call upon us if you need our help in the future.

1. What program are you most proud of? Why?
2. What event is your most profitable? Why?
3. What ideas have worked for your organization?
4. What ideas have not worked?
5. What challenges has your organization faced?
6. How has your organization faced those challenges?
7. What changes is your organization planning or implementing? Why?
8. What most important lessons have you learned as Executive Director?

## Strategic Planning Retreat Schedule

### DAY ONE

1:00 p.m.	Snacks/soft drinks
1:05 p.m.	Welcoming Remarks—Overview of Retreat/ Introductions
1:15 p.m.	Survey Findings and Discussion
2:00 p.m.	Discussion of S.W.O.T.
3:00 p.m.	Break
3:15 p.m.	Discussion of Specific Issues of Concern ( <i>i.e.</i> , Membership, Image, Young Lawyers)
4:00 p.m.	Identification of General Goals/Initiatives
5:00 p.m.	Adjourn
6:00 p.m.	Group Dinner

### DAY TWO

8:00 a.m.	Continental Breakfast
8:15 a.m.	Goal #1
9:15 a.m.	Goal #2
10:00 a.m.	Break
10:15 a.m.	Goal #3
11:15 a.m.	Goal #4
12:15 p.m.	Final Remarks/Next Steps
12:30 p.m.	Adjourn

## Sample Goals

### Goal #1

#### STABILIZE/GROW MEMBERSHIP

##### Action Steps:

1. Formalize a Membership Committee of “doers” with past presidents, current leaders, young lawyers (12-15 committed members)
2. Study your demographics by age, practice area, geographic area, firm size, and gender to assess areas to target for growth. (Identify persons and firms who are regular participants at events.)
3. Undertake a membership “campaign” to grow membership

- a. Personal asks/phone calls/handwritten notes and mailings and emails
  - b. Larger firm presentations (a/k/a “Dog and Pony shows”)
  - c. Targeting outreach to in-house, corporate and government counsel
  - d. Review DRI membership list for non-SLDO members and go after them
  - e. Go after lapsed members—bring them back if possible
4. Create a Young Lawyer Section with a steering committee of 12-14 and Chair/Vice
    - a. Put together a calendar of events
    - b. Host a “Rookie” Seminar that includes a reduced price if the YL joins
    - c. Invite YL participation in *all* seminars/events and give them a role
  5. Study the activities and outreach of your new Women in Law Committee and devise a membership drive
    - a. Plan meetings for the year and roles at meetings/seminars
  6. Look at Membership dues/fee structures

Proposed Deadline/Schedule for Implementation: \_\_\_\_\_

Person(s) responsible for implementation/oversight: \_\_\_\_\_

## Goal #2

### “FRESHENING” THE SLDO AND “GAINING ENGAGEMENT”

#### Action Steps:

1. Look at your “brand.” What is it? How do you communicate it? Is there a “tag” line that speaks to who you are? What does your “image” convey to others?
2. Spend money on college student or professional assistance to refine your “value” proposition and *how* to get that message to the state bar and judiciary.
3. Take a *hard* look at your *Meetings*. Freshen them. Invite a wider range of people to speak and be on panels. YL’s, women, newcomers, substantive committees.

4. Are your committees operating? Form steering committees with a chair, vice-chair, YL chair. Charge them to write articles, plan events, engage in membership activities.
5. Networking. More and better events and online e-communities.
6. Freshen the look of your magazine. Make it available in a digital form.
7. Special events/seminars
  - a. “Back to School” seminar on a University or Law School campus
  - b. “Homecoming” seminar/event as part of a membership drive
  - c. A special judicial event with oral argument of appellate court.
  - d. Law Practice Management seminar
8. Freshen mass communications—more bulletins; get Twitter account active; LinkedIn; Facebook. Consider columns and articles in statewide legal publications.

Proposed Deadline/Schedule for Implementation: \_\_\_\_\_

Person(s) responsible for implementation/oversight: \_\_\_\_\_