

Erie County Bar Association

# STRATEGIC PLAN

2023-2026

# ERIE COUNTY BAR ASSOCIATION 2023-2026 STRATEGIC PLAN

## Our Mission

Although the practice of law has changed dramatically over the past century, the mission of the Erie County Bar Association has not. We remain dedicated to maintaining professional standards of the highest caliber, advancing the administration of justice, and serving the interests of our varied constituencies without compromise. We assist our members in the practice of law and by engaging in activities that promote the public's understanding of and respect for our American system of law and justice.

# Erie County Bar Association 2023-2026 Strategic Plan

<p>Goal 1: ECBA leadership and membership is engaged with the activities of the association with a focus on the association's future</p>	<p>We will achieve this by:</p> <p>Strategy 1: Building the ECBA board's capacity and engagement</p> <p>Strategy 2: Utilizing in-person events and virtual programs to enhance the member experience</p> <p>Strategy 3: Cultivating a welcoming membership culture that makes leadership development a priority</p> <p>Strategy 4: Reviewing and improving the ECBA's online presence</p>
<p>Goal 2: ECBA ensures its short- and long-term financial stability</p>	<p>We will achieve this by:</p> <p>Strategy 1: Emphasizing and enhancing non-dues revenue</p> <p>Strategy 2: Preparing for different scenarios regarding the future of legal journal advertising</p> <p>Strategy 3: Exploring potential new member categories and other professional development opportunities</p>
<p>Goal 3: The ECBA is recognized in Erie as a key community resource</p>	<p>We will achieve this by:</p> <p>Strategy 1: Serving as a resource especially when legal and/or judiciary-related issues arise in the community</p> <p>Strategy 2: Highlighting existing community-focused programs like Wills for Heroes and the Pardon Project</p>

# Erie County Bar Association 2023-2026 Strategic Plan

## Goal 1

ECBA leadership and membership is engaged with the activities of the association with a focus on the association's future

**Success benchmarks:**    ↑ Board in-person attendance, ↑ Attendance at events, ↑ Board engagement, ↑ potential ECBA leaders    ↑ Engagement at ECBA virtual events

**Current supporting activities:** ECBA governance activities, social events, CLE

We will achieve this by:

Next Steps

Responsibility

Timeframe

Comments

### Strategy 1: Building the ECBA board's capacity and engagement

<p>1. Make board meetings strategically focused</p>	<p>→ Can board meetings be less frequent? Can use of a consent agenda and other tools make meetings more strategic?</p>	<p>→ Board of Directors, Executive Director</p>	<p>→ Winter 2023</p>	<p>Examples of agendas are available from the ABA Division for Bar Services</p>
<p>2. Board orientation/onboarding process includes committee assignments and other tangible responsibilities for new board members</p>	<p>→ Development of a ECBA board member agreement/pledge of commitment</p>	<p>→ Board of Directors, Executive Director, President</p>	<p>→ Winter 2023</p>	

**Strategy 2: Utilizing in-person events and virtual programs to enhance the member experience**

<p>1. Review current roster of in-person events. Determine the essential in-person events for ECBA in the post-pandemic era</p>	<p>→ Factors to consider: revenue, attendance, relevance to ECBA’s mission, staff time</p>	<p>→ Board of Directors, Executive Director, President</p>	<p>→ Fall 2023</p>	
<p>2. Develop best practices regarding hybrid or virtual meetings. Does the ECBA need to invest in additional technology to enhance the virtual meeting experience?</p>	<p>→ When is in-person essential? Should CLEs be either in-person, virtual or continue to be hybrid? What format is most effective for revenue? For member engagement?</p> <p>→ Factors to consider for technology: cost of Meeting Owls or similar technology, ease of use by staff &amp; volunteers, can work with existing ECBA technology</p>	<p>→ Board of Directors, Section and Committee leaders, ECBA staff</p>	<p>→ Summer 2023</p>	

**Strategy 3: Cultivating a welcoming membership culture that makes leadership development a priority**

<p>1. Create a New Member Welcome committee that reaches out online and in-person to new ECBA members.</p>	<p>→ Committee should be a cross-section of ECBA members representing different ages, practice settings, etc.</p> <p>→ The committee works to alleviate the anxiety felt by many new members</p>	<p>→ Board of Directors, Section and Committee leaders, Executive Director</p>	<p>→ Fall 2023</p>	
<p>2. Board members are ambassadors to the organization, particularly at bar events</p>	<p>→ Board members prioritize meeting new members at events and introducing them to the ECBA</p> <p>→ Leadership development should be added to every board</p>	<p>→ Board of Directors</p> <p>→ Board of Directors, Section and</p>	<p>→ Ongoing</p> <p>→ Ongoing</p>	

<p>3. Board members, past ECBA leaders and other key association stakeholders serve as talent scouts for future ECBA leaders</p>	<p>agenda, and board members are asked to identify promising leadership candidates</p> <p>➔ The talent scout role is also emphasized during the board orientation process and the first board meeting of the bar year</p>	<p>Committee leaders, Executive Director</p>		
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**Strategy 4: Reviewing and improving the ECBA’s online presence**

<p>1. Take a critical look at the ECBA’s website. What design changes and content additions would make it a more useful tool to ECBA members?</p>	<p>➔ Explore simple fixes like an association-wide calendar listing all events, CLEs, etc.</p> <p>➔ Other factors to consider for website: What new features will bring more functionality for members? What are less staff invasive places where information can be added to the site</p>	<p>➔ Board of Directors, Section and Committee leaders, Executive Director, ECBA staff</p>	<p>➔ Winter 2023</p>	<p>The National Association of Bar Professionals’ Communication Section is an excellent resource for web site and social media best practices</p>
<p>2. What are the social media priorities for the ECBA</p>	<p>➔ What social media platform (Instagram, LinkedIn, Twitter or Facebook) yields the most engagement with ECBA members? To minimize staff time, can the ECBA emphasize the one platform that is most utilized by its members?</p>	<p>➔ Executive Director, ECBA staff, Board of Directors</p>	<p>➔ Ongoing</p>	

## Goal 2

## ECBA ensures its short- and long-term financial stability

**Success benchmarks:** ↑Non-dues revenue, ↑understanding of benefits received via ECBA membership, ↑LRIS revenue, ↑Usage of ECBA bar center ↑use and participation in the ECBA LRIS program

**Current supporting activities:** ECBA member benefit program, rental opportunities at the ECBA bar center, CLE, PBA unit bar program, LRIS program, legal journal advertising

We will achieve this by:

Next Steps

Responsibility

Timeframe

Comments

Strategy 1: Emphasizing and enhancing non-dues revenue

1.	Explore potential revenue from rental fees from ECBA bar center	<ul style="list-style-type: none"> <li>➔ Would additional marketing, web site information increase visibility for this unique and beautiful property?</li> </ul>	➔ Executive Director, ECBA staff, Board of Directors	➔ Ongoing	
2.	Review and bolster participation in the ECBA's Standing Business Partner Committee	<ul style="list-style-type: none"> <li>➔ Review current list of participants for relevancy. Identify and solicit potential new partners.</li> <li>➔ Create web content and other marketing highlighting the program</li> </ul>	➔ Standing Business Partner Committee, Executive Director, ECBA staff	➔ Winter 2024	
3.	Review long-term sustainability of the LRIS program	<ul style="list-style-type: none"> <li>➔ Many bar association LRIS programs are struggling. Regularly review program participation, query volume, investment of staff time and overall profitability to ensure this program's continuous success</li> </ul>	➔ LRIS committee, ECBA staff, Board of Directors	➔ Ongoing	Resources of LRIS best practices are available via the ABA Standing Committee on Lawyer Referral and Information Systems

**Strategy 2: Preparing for different scenarios regarding the future of legal journal advertising**

1.	Create a special committee to develop scenarios if legal journal advertising revenue regulations were to be changed by the Commonwealth	<ul style="list-style-type: none"> <li>➔ The ECBA should be prepared if the revenue from journal advertising was redirected away from county bar associations</li> <li>➔ Committee will develop various scenarios and strategies in case this (hopefully unlikely) event ever occurs</li> </ul>	➔ Executive Director, ECBA staff, Board of Directors	➔ Spring 2024	
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**Strategy 3: Exploring potential new member categories and other professional development opportunities**



<p>1. Develop trial paralegal/legal assistance membership program</p>	<ul style="list-style-type: none"> <li>➔ Do you have a compelling member value proposition and tangible member benefits for this population?</li> <li>➔ Do you have potential leaders from the Erie paralegal community that can help with this process?</li> </ul>	<ul style="list-style-type: none"> <li>➔ Executive Director, ECBA staff, Board of Directors, Membership Committee</li> </ul>	<ul style="list-style-type: none"> <li>➔ Summer 2024</li> </ul>	
<p>2. Explore relationships with legal-adjacent departments at local colleges and universities.</p>	<ul style="list-style-type: none"> <li>➔ ECBA members can help students navigate potential legal careers, serve as resources for classes and professors</li> </ul>	<ul style="list-style-type: none"> <li>➔ Executive Director, ECBA staff, Board of Directors,</li> </ul>	<ul style="list-style-type: none"> <li>➔ Fall 2024</li> </ul>	<p>Potential non-dues revenue from this outreach is more intangible than tangible. Future members may be created from these efforts</p>

## Goal 3 The ECBA is recognized in Erie as a key community resource

**Success benchmarks:** ↑ Community recognition of ECBA partnerships with other Erie County organizations; ↑ Awareness of current ECBA public-facing activities

**Current supporting activities:** Law Day, Wills for Heroes, Pardon Project

We will achieve this by:	Next Steps	Responsibility	Timeframe	Comments
<b>Strategy 1: Serving as a resource especially when legal and/or judiciary-related issues arise in the community</b>				
1. Build upon the bar’s reputation in Erie as an important community partner	→ Seek out opportunities that position attorneys as problem solvers and the ECBA as a source of potential solutions	→ Board of Directors, Section and Committee leaders, Executive Director, ECBA staff	→ Ongoing	
2. Explore meaningful and intentional partnerships with other Erie organizations	→ Where is the value of the ECBA’s presence welcomed and valued? Are there opportunities to partner with other professional groups?	→ Board of Directors, Section and Committee leaders, Executive Director, ECBA staff	→ Ongoing	
<b>Strategy 2: Highlight existing community-focused programs like Wills for Heroes and the Pardon Project</b>				
1. Continue to publicize and increase awareness of existing ECBA projects that serve the community	→ Explore media outreach, social media posts from the ECBA and its members, web content, etc. to shine a light on these programs	→ Board of Directors, Section and Committee leaders, Executive Director, ECBA staff	→ Ongoing	

## Erie County Bar Association 2023-2026 Strategic Plan

### Implementation timeline

Strategies/Action Items	Responsibility	Timeframe	Comments
1. Present strategic framework to the board for discussion and vote	Officers	February 2023	
2. Finish prioritizing items and refine the timeline	Board/Executive Director	By March 2023	
3. Confirm an individual to shepherd the plan and/or board leaders for each goal area. <ul style="list-style-type: none"> <li>These individuals can be liaisons to those involved in implementation and will be responsible for reporting to the board on progress</li> </ul>	Officers/Board	By March 2023	
4. Resource discussion <ul style="list-style-type: none"> <li>Begin to explore budget implications for 2023 priorities</li> <li>Do we have the monetary resources? If not, can we redirect funds from other areas or do we need to seek new money?</li> <li>Do we have adequate staff and volunteer resources?</li> <li>Are there revenue-generating opportunities in any of our ideas?</li> <li>What will we scale back/phase out/stop in order to make room?</li> </ul>	Board/Executive Director	By July 2023	
5. Revisit your success benchmarks and refine them <ul style="list-style-type: none"> <li>ID data you have readily available; determine what data you need and create a plan for obtaining it. Be selective.</li> </ul>	Board/Executive Director	By January 2024	
6. Once a final plan is accepted, communicate with members about your priorities <ul style="list-style-type: none"> <li>Address the survey results and how the board responded to them</li> <li>Venues: Publications, introductory remarks for events, social media</li> <li>Use the plan to engage individuals who haven't been involved</li> </ul>	Officers/ Board/Executive Director	As soon as the plan is adopted	
7. Maintain momentum <ul style="list-style-type: none"> <li>Keep items from the plan on every board agenda</li> <li>Check in on the plan at six months. Assess progress and make adjustments</li> <li>Call Molly for additional resources or whenever questions arise</li> </ul>	Officers/ Board/Executive Director	Ongoing	