



DIVISION FOR
BAR SERVICES

Wake County Bar Association & Tenth Judicial District Bar March 2018 – December 2018 Strategic Planning Report

1. Components of the Report

The strategic planning report consists of three parts: 1) the narrative summary of the planning process (this document); 2) a planning overview and matrix that includes the WCBA and Tenth Judicial District Bar's vision, values, goals, strategies and proposed action items; and 3) appendices, which include background documents and the transcription of the flipchart sheets.

2. Information Gathering and Preparation

The WCBA and Tenth Judicial District Bar kicked off their planning process with a May conference call with the bars' officers and executive director. During that conversation, the leaders discussed the critical issues facing the organization and their expectations and hopes for the planning process. In June, the full Strategic Committee gathered on a conference call to discuss the bars' notable recent accomplishments and strengths and to review the previous strategic plan. During a July conference call, the planning committee regrouped to discuss the current landscape and highlights from the membership survey that was conducted in 2017. An outline of critical issues was developed and circulated to the group in August, based on the membership survey and a survey of the bars' leadership. These documents all are included in the appendices.

The September 2018 planning session was rescheduled to December because of Hurricane Florence. An additional "refresher" conference call was held in early December to remind the Strategic Planning Committee of the key issues for discussion.

3. The December 19th Session

Attending the December 19th retreat were: Strategic Planning Chair Edd Roberts, Hon. Ned Mangum, Maria Lynch, David L. Sherlin, Nancy L. Grace, Russell Babb, Julie Bell, Ashley Campbell, Stephanie D'Atri, Sam Fleder, Evin Grant, James Hash, Day Matthews, Jessica Vickers, Colon Willoughby, Joe Zeszotarski, Sarah Justice and Whitney von Haam.

After a brief welcome, the group discussed the entry points for WCBA and Tenth Judicial District Bar engagement. Following that, we recapped the WCBA/Tenth's strengths and the critical issues identified through the survey results and elsewhere. Major discussion threads included:

- The strengths of existing WCBA/Tenth programs and services
- Opportunities to build on the successes relating to member engagement, especially using personal outreach
- The demographics of lawyers practicing in Wake County, and the relative youth of the population relative to other jurisdictions
- Opportunities to grow the WCBA membership with focus on particular segments, including new lawyers and law students
- The importance of the bars' public service offerings and how the bars may be able to build on those
- The opportunities to create a more flexible infrastructure, including headquarters location

Following that discussion, the group engaged in a visioning discussion where small groups articulated their vision for the organization. The facilitator crafted a draft vision statement drawing from the work of the small groups.

Draft Vision:

By 2022, area lawyers will view both the Wake County Bar Association and 10th Judicial District Bar as essential to a successful practice. Members will enjoy a more rewarding professional experience because of the bars' valuable programming, its welcoming culture, and the bars' leadership in and engagement with the profession and community-at-large.

The remaining portion of the morning was spent refining and clarifying the goal areas and defining measures of success. The measures of success are included in the planning matrix.

Following the session, the goals were refined as follows:

- Goal 1: Be a leading resource for members to achieve professional excellence and personal fulfillment in the practice of law**
- Goal 2: Create rewarding member engagement opportunities that advance the bars and foster individual growth**
- Goal 3: Increase membership in the Wake County Bar Association**
- Goal 4: Serve the Wake County community in ways that engage our diverse membership**
- Goal 5: Ensure the bars have an infrastructure that enables them to nimbly and cost-effectively achieve their goals**

After lunch, small groups discussed the approaches the organization should take in each of the goal areas. After some discussion, participants also began to prioritize the ideas. The group articulated some prudent

first steps. Some additional discussion, prioritization and refinement will be necessary. The group also should revisit the measures of success to ensure that the measures make use of data that is readily available.

The WCBA/Tenth Judicial District officers will present the strategic framework to the full board at a meeting in early 2019. Following that discussion, the plan can be operationalized in collaboration with the executive director. Additional prioritization will be necessary as ideas are more fully developed and you have more information about the resources items will require. Pair larger, more complex initiatives with some that can be more easily accomplished. Early wins are important to maintain momentum. The operational plan should recommend entities that will be responsible for advancing action items as well as a proposed implementation timeline.

4. Additional Recommendations Regarding Implementation

- a. When delegating to committees or workgroups, clearly communicate expectations regarding:
 - Why the activity/initiative is important
 - Whom the activity/initiative serves
 - How impact will be measured
 - How implementation will be monitored
 - What the timeframe is for the initial phase of the implementation plan
 - What resources are available for implementation, including staff, volunteer, and financial resources
- b. Communicate and build plan support, including how existing activities support the goals and strategies. This is crucial given the importance of cultivating member awareness and engagement in this plan. Some key steps are:
 - Share the plan with volunteer leadership throughout the organization
 - Communicate the importance of committee work that supports the plan
 - Communicate with membership about the plan. Let them know how their input via the survey informed the planning group's choices about the future of the organization.
- c. Adjust and adapt as circumstances warrant.

Surely, modifications to the plan will be necessary. Circumstances change and external shifts in the environment occur—the political landscape changes, important partners experience transitions in leadership, a disruptive technology appears. This is to be expected; the plan should evolve. While discussion of the plan should take place at every board meeting, time should be set aside at least once a year for deeper reflection on the bar's progress vis-à-vis the goals and benchmarks it has set. What did the bar accomplish? Are the initiatives the bar is undertaking helping it make progress toward its goals?

d. Steady goes the race.

Effective strategic planning is a marathon that is run like a relay race. It is a group effort, and oftentimes the finish line is not in sight. Success requires agreement on strategy, effective use of resources over time, and understanding the capacity of the runners on various parts of the course. By taking on too much at once, the bar can stretch itself too thin and do its members and other constituents a disservice. Be selective about where to place your efforts so that you are making the appropriate investment for success.

In Conclusion

Throughout this process, WCBA/Tenth Judicial District Bar leadership has thoughtfully explored the opportunities and challenges present in the current environment. This new roadmap for the future will enable the organization to continue to serve lawyers in Wake County with efficacy and integrity.

Respectfully submitted,
Jennifer Lewin
Deputy Director
ABA Division for Bar Services
February 11, 2019



TENTH
TENTH JUDICIAL DISTRICT BAR

Wake County Bar Association & 10th Judicial District Bar

STRATEGIC PLAN

2019-2022



2019-2022 STRATEGIC PLAN

Vision

By 2022, area lawyers will view both the Wake County Bar Association and 10th Judicial District Bar as essential to a successful practice. Members will enjoy a more rewarding professional experience because of the bars' valuable programming, its welcoming culture, and the bars' leadership in and engagement with the profession and community-at-large.

Values that guide our work

Integrity
Inclusivity
Responsiveness

Transparency
Innovation
Service



2019-2022 STRATEGIC PLAN

<p>Goal 1: Be a leading resource for members to achieve professional excellence and personal fulfillment in the practice of law</p>	<p>Strategy 1: Refine the bars' education programs to meet members' diverse needs</p> <p>Strategy 2: Increase support for new lawyers as they transition into practice</p> <p>Strategy 3: Leverage technology to complement and extend programs and services</p> <p>Strategy 4: Demonstrate our commitment to lawyer wellness in all we do</p>
<p>Goal 2: Create rewarding member engagement opportunities that advance the bars and foster individual growth</p>	<p>Strategy 1: Continue to strengthen our inclusive, welcoming culture</p> <p>Strategy 2: Increase the diversity of those who actively engage with the WCBA/10th Judicial District Bar</p> <p>Strategy 3: Create more continuity between the Young Lawyers Division and the WCBA/10th Judicial District Bar</p> <p>Strategy 4: Build our intentional leadership development processes</p>
<p>Goal 3: Increase membership in the Wake County Bar Association</p>	<p>Strategy 1: Sustain a high WCBA retention rate by reinforcing the bar's value and promoting engagement</p> <p>Strategy 2: Engage in targeted outreach to area lawyers</p> <p>Strategy 3: Foster partnerships to raise the visibility of the WCBA/10th Judicial District Bar and their benefits</p>
<p>Goal 4: Serve the Wake County community in ways that engage our diverse membership</p>	<p>Strategy 1: Raise member awareness of community service opportunities</p> <p>Strategy 2: Engage the bar community in service through a flagship service day project</p> <p>Strategy 3: Expand opportunities to address community needs through partnerships with other organizations</p>
<p>Goal 5: Ensure the bars have an infrastructure that enables them to nimbly and cost-effectively achieve their goals</p>	<p>Strategy 1: Assess the flexibility and capacity of the bars' current infrastructure</p> <p>Strategy 2: Evolve the technology infrastructure to meet the future needs of members and the bars</p> <p>Strategy 3: Ensure the bars' governance structures align with evolving priorities</p>

Goal 1

Be a leading resource for members to achieve professional excellence and personal fulfillment in the practice of law

Success benchmarks: ↑ usage of programs/services, especially Professionalism for New Attorneys program and CLE; ↑ engagement of lawyers 1-2 years in practice

Current supporting activities: Continuing legal education programming, emphasis on wellness

Strategies/Action Items	Next Steps	Responsibility	Timeframe	Comments
Strategy 1: Refine the bars' education programs to meet members' diverse needs				
Initial supporting ideas: <ul style="list-style-type: none"> • Increase the participation of judges and luminary lawyers • Differentiate in-person programming from online with more interactive program structures • Focus on what's unique in Wake County/10th • Share specific suggestions from the member survey 	→ Continue to evaluate the number/diversity of programs and opportunities to integrate the suggestions at left. Communicate with those leading program development	→ WCBA/10 th leaders, staff + program chairs	→ 2019 and ongoing	Priority area
Strategy 2: Increase support for new lawyers as they transition into practice				
Initial supporting ideas: <ul style="list-style-type: none"> • Professionalism for New Attorneys and other CLE • Practice management programming • Mentoring opportunities 	→ What existing programs can we build on? Are there other gaps the WCBA/10 th can fill?	→ Staff, Young Lawyer Division leaders and others TBD	→ TBD	Priority area

Strategy 3: Leverage technology to complement and extend programs and services

<p>Objective: Increase geographic diversity of program participants, and appeal to YLs and those more inclined to access resources online</p> <p>Initial supporting ideas:</p> <ul style="list-style-type: none"> • Develop practice management resources, such as on-demand templates • Develop videos that share the history of the bars, highlight local leaders in the law 	<p>➔ Explore the opportunities</p>	<p>➔ Staff, CLE Committee, other program chairs or planners</p>	<p>➔ TBD</p>	
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Strategy 4: Demonstrate our commitment to lawyer wellness in all we do

<p>Initial supporting ideas:</p> <ul style="list-style-type: none"> • Continue to experiment with programming that addresses wellness topics directly • Consider how to thread lawyer wellness through existing programming 	<p>➔ Communicate emphasis to individuals leading program/event development</p>	<p>➔ WCBA/10th JD Bar leaders + Staff</p>	<p>➔ 2019 and ongoing</p>	
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Goal 2

Create rewarding member engagement opportunities that advance the bars and foster individual growth

Success benchmarks: “Everyone used their membership once” OR ↑ increase in numbers of unique individuals participating; increased diversity of members participating; diversity in leadership continues and expands; ↑ % of respondents indicate the bar is welcoming and that they have higher levels of involvement (follow-up survey)

Current supporting activities: Leadership development program, committee activity, committee selection process, new board nomination process

Strategies/Action Items	Next Steps	Responsibility	Timeframe	Comments
Strategy 1: Continue to strengthen our inclusive, welcoming culture				
Initial supporting ideas: <ul style="list-style-type: none"> • Provide more advanced notice of events + more comprehensive list of events/dates • Use personal invitations to engage new members • Create a focused effort on connecting with new attendees including follow-up contact post-event • Ensure there is adequate diversity of offerings/events • Connect with law schools to establish an early relationship with potential members 	→ Prioritize bulleted items at left	→ Boards + staff, committee chairs	→ 2019 and ongoing	
Strategy 2: Increase the diversity of those who actively engage with the WCBA/10th Judicial District Bar				
Initial supporting ideas: <ul style="list-style-type: none"> • Expand/empower the leadership committee • Explore possible collaboration with other groups • Use targeted and personal outreach • Seek feedback from members • Ensure the diversity location of activities 	→ Prioritize bulleted items at left	→ Boards + staff, committee chairs	→ TBD	

Strategy 3: Create more continuity between the Young Lawyers Division and the WCBA/10th Judicial District Bar

<p>Initial supporting ideas:</p> <ul style="list-style-type: none"> • Better coordinate committees and YLD • Use targeted and personal outreach, but ensure the bar is stretching beyond its usual networks 	<p>➔ Develop an action plan</p>	<p>➔ Boards, YLD + staff</p>	<p>➔ TBD</p>	
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Strategy 4: Build our intentional leadership development processes

<p>Initial supporting ideas:</p> <ul style="list-style-type: none"> • Use targeted and personal outreach, but ensure the bar is stretching beyond its usual networks • Continue to monitor the success of the new nominating process • Create more meaningful recognition for involvement 	<p>➔ Develop additional ideas to support this strategy</p>	<p>➔ TBD</p>	<p>➔ TBD</p>	
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Goal 3 Increase membership in the Wake County Bar Association

Success benchmarks: Baseline goal is 44% market share. Aspirational goal is 50% market share.

Current supporting activities: All current membership processes and programming

Strategies/Action Items	Next Steps	Responsibility	Timeframe	Comments
Strategy 1: Sustain a high WCBA retention rate by reinforcing the bar's value and promoting engagement				
See also Goals 1 and 2				
Strategy 2: Engage in targeted outreach to area lawyers				
<p>Priority audiences established as: Former members, new lawyers 1-2 years in practice, young lawyers generally, larger firm/managing partners, law students</p> <p>Initial supporting ideas:</p> <ul style="list-style-type: none"> • Continue to rework marketing strategies to reach the different audiences • Continue connecting with law schools • Use individual relationships to connect with firms that have less participation • Challenge members to find members to join • Periodically evaluate efforts to ensure the WCBA is focusing on the right issues and audiences 	<p>➔ Develop supporting ideas and prioritize.</p>	<p>➔ Boards, staff, Membership Services Committee</p>	<p>➔ 2019 and ongoing</p> <p>➔ 2019 and ongoing</p> <p>➔ TBD</p> <p>➔ TBD</p> <p>➔ 2019 and ongoing</p>	

Strategy 3: Foster partnerships to raise the visibility of the WCBA/10th Judicial District Bar and their benefits

<p>Potential partnerships included: Paralegals, CCLA, WCACTL, TLAN, Wake Women Attorneys, Conference of DAs, NCAJ, 50 Year Attorneys, Inns of Court and other specialty bars</p>	<p>➔ Explore opportunities to provide support and infrastructure to these groups (See also Goal 5)</p>	<p>➔ Boards + staff</p>	<p>➔ TBD</p>	
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Goal 4

Serve the Wake County community in ways that engage our diverse membership

Success benchmarks: ↑ % of members are engaging in community service; media coverage is desirable, but secondary

Current supporting activities: Work of the Public Service Committee, Bar Awards Committee and Foundation

Strategies/Action Items	Next Steps	Responsibility	Timeframe	Comments
Strategy 1: Raise member awareness of community service opportunities				
Initial supporting ideas: <ul style="list-style-type: none"> • Highlight the bar’s public service initiatives on the website • Increase recognition of volunteers • Create an “interest portal” that lists public service opportunities and connects to Pro Bono Portal) 	→ Integrate into web development plan; are there other ways to raise member awareness?	→ Staff, Public Service Committee, Bar Awards Committee	→ 2019 and ongoing	
Strategy 2: Engage the bar community in service through a flagship service day project				
Initial supporting ideas: <ul style="list-style-type: none"> • Create a flagship or flexible service day project to address specific community needs • Consider a partnership with the media and/or the law schools • Maximize media coverage, if feasible 	→ Explore the opportunities in collaboration with partners (such as courts)	→ Public Service Committee in collaboration with boards, staff	→ TBD	
Strategy 3: Expand opportunities to address community needs through partnerships with other organizations				
Consider the following: Wake County Bar Foundation, YLD, LANC, NCBA	→ Where are the opportunities? Do members have a way to suggest ideas?	→ Public Service Committee in collaboration with board	→ TBD	

Goal 5

Ensure the bars have an infrastructure that enables them to nimbly and cost-effectively achieve their goals

Success benchmarks: Continuing ability to retain excellent staff, other benchmarks TBD

Current supporting activities: Existing infrastructure and processes

Strategies/Action Items	Next Steps	Responsibility	Timeframe	Comments
Strategy 1: Assess the flexibility and capacity of the bars' current infrastructure				
Determine the future of the bars' HQ <ul style="list-style-type: none"> If a move is feasible, this will create opportunities to engage members (how they will use the building, etc.). Develop an engagement plan As the bars develop their own HQ plan, explore opportunities to partner with other organizations to provide space/support 	→ Continue exploration of opportunities.	→ New Space Task Force	→ 2019 and ongoing; more specific timeline TBD	
Determine the future of the bars' administrative infrastructure	→ Explore costs/time of setting up separate infrastructure	→ Staff + boards		
Strategy 2: Evolve the technology infrastructure to meet the future needs of members and the bars				
Determine existing and future needs and create a plan of action	→ Do it.	→ Staff + boards	→ TBD	
Strategy 3: Ensure the bars' governance structures align with evolving priorities				
Monitor the impact of the new board selection processes and make adjustments, as necessary	→ Do it.	→ Boards	→ 2019 and ongoing	
Review the organizations' missions to ensure they reflect the current realities and tell a compelling story	→ Do it.	→ TBD	→ TBD	

WCBA/10th Judicial District Bar 2019-2022 Strategic Plan

Implementation timeline

Strategies/Action Items	Responsibility	Timeframe	Comments
1. Present strategic framework to the boards for discussion and vote	Officers	February 2019	
2. Finish prioritizing items and refine the timeline	Boards	By April 2019	
3. Confirm an individual to shepherd the plan and/or board leaders for each outcome area. <ul style="list-style-type: none"> • These individuals can be liaisons to those involved in implementation and will be responsible for reporting to the board on progress 		Completed	
4. Resource discussion <ul style="list-style-type: none"> • Begin to explore budget implications • Do we have the monetary resources? If not, can we redirect funds from other areas or do we need to seek new money? • Do we have adequate staff and volunteer resources? • Are there revenue-generating opportunities in any of our ideas? • What will we scale back/phase out/stop in order to make room? 	Officers/Boards	April/May	
5. Revisit your success benchmarks and refine them <ul style="list-style-type: none"> • ID data you have readily available; determine what data you need and create a plan for obtaining it. Be selective. 	Officers/Boards	April/May	
6. Once a final plan is accepted, communicate with members about your priorities <ul style="list-style-type: none"> • Address the survey results and how the board responded to them • Venues: Publications, introductory remarks for events, social media 	Officers/Boards	As soon as the plan is adopted	
7. Longer term <ul style="list-style-type: none"> • Once a final plan is accepted, communicate with members about your priorities • Use the plan to engage individuals who haven't been involved • Keep items from the plan on every board agenda • Check in on the plan at six months. Assess progress and make adjustments • Call Jennifer for additional resources or whenever questions arise 	Officers/Boards		



DIVISION FOR
BAR SERVICES

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Wake County Bar Association/10th Judicial District Bar Strategic Planning Process Proposal April 9, 2018

The ABA Division for Bar Services is delighted to submit a proposal to assist the Wake County Bar Association and 10th Judicial District Bar with its 2018 strategic planning process. The following timeline lays out the major components we would recommend for this process.

Review of previous strategic plan

- Opportunity to discuss accomplishments, efforts that were less successful, items upon which the bar did not take action and why

Understanding the broader bar association landscape

- Trends in bar associations and in the legal profession. We can provide the committee with access to our trends webinar and a selection of key articles about key issues facing bar associations and the legal profession

Understanding the WCBA's/10th Judicial District Bar's particular context

- Work with bar staff to assemble and analyze critical membership and program data such as:
 - 3-5 years of overall membership data
 - Demographic data about current members: age, gender, race/ethnicity, practice area, practice setting, office location, as available
 - Inventory of programs and program use
- Review of 2017 Membership Survey Results
- Focus groups or individual stakeholder outreach, if necessary
- Brief survey (4-5 questions) of the boards of the respective bars

These components have been integrated into the timeline that follows on page 2.

Wake County Bar Association/10th Judicial District Bar Strategic Planning Process Proposed Planning Timeline

April 2018	Confirmation by all parties
Mid May	Conference call with Steering Group (Strategic Planning Committee Chair, Officers and Executive Director) to discuss state of the organization, expectation for upcoming planning process and process schedule
Mid June	Introductory conference call with full Strategic Planning Committee to discuss planning timeline, previous plan accomplishments and current trends in the bar association landscape
Late June	Jennifer to circulate selected background articles for Strategic Planning Committee review Jennifer to survey the respective boards of directors regarding critical issues
June-July	Planning committee conducts outreach, as determined in initial conference call
Late July	Conference call with full Strategic Planning Committee to discuss 2017 Membership Survey Results and areas of focus for the plan
August	Working group time, if necessary
Mid August	Jennifer to circulate draft session agenda to Steering Group and coordinate with Executive Director regarding the retreat details
September 12-14 TBD	Wake County Bar Association/10 th Judicial District Bar Planning Retreat
Early October	Follow-up conference call with Steering Group to discuss draft report and next steps
Late October	Final Report delivered to Steering Group

**Wake County Bar Association/Tenth Judicial District Bar
Strategic Planning Meeting
June 25, 2018 Conference Call**

Recap

On the call were: Edd Roberts, Ned Mangum, Maria Lynch, David Sherlin, Nancy Grace, James Hash, Stephanie D'Atri, Ashley Campbell, Julie Bell, Sam Fleder, Jessica Vickers, Colon Willoughby, Evin Grant, Sarah Justice and Whitney von Haam

Jennifer asked each participant to identify one especially meaningful development for the bars in the last three years. Participants mentioned:

- Dedication to inclusion – this played out in the way new members are welcomed into the bar, how the bar cultivated new (often younger) leadership for committees and to serve in other roles, and the general culture of the bar overall
- A culture of mentoring and partnership to ensure new leaders can be successful in those roles
- Dedication to public service – especially notable is the reinvigoration of the foundation and the work of the other public service entities
- The intentionality with which functions are carried out; the recognition of the need to change, but not change for change's sake
- Increased capacity in the communications area with the hiring of Sarah
- Successfully connecting with and attracting new lawyers – with special acknowledgement of the Summer Clerk Orientation Program and a stronger YLD
- More communications across committees
- Creating a culture of service and bar leadership
- Increase in diversity in leadership – moving in the right direction, greater diversity in decision-making
- The quality of our local CLE as an added value for members

Review of the previous plan (Whitney and all)

Goal 1:

Wins: Growing CLEs, offering different times and places, social, healthy living, more family friendly options; creating a more welcoming culture (welcome notes); encouraging all leaders to pass along that welcoming culture; more time to work-life balance; using technology

Still to do: archiving content; improving networking; haven't done anything with practice management; virtual option like Indy

Probably should die: online CLE

Goal 2: Promote professionalism

Wins: Growing membership program; publications; cross-pollination with other committees; won the Gambrell Award

Still to do: no resources library (like archive)

Goal 3: Improve awareness

Wins: Communications director, website under construction; publications revamp

Still to do: way to increase referrals between memberships; increase web advertising; Speaker's bureau, improve public perception

Goal 4:

Wins: Increasing membership through a variety of means; recreated welcome packet; added new elements to welcoming process

Still to do: actively follow up with summer clerk participants; activating law students; tracing achievements; further involve

Should die: family auxiliary idea

Goal 5: Connecting lawyers to community

Wins: Partners Read, rule of law program, Camp Confidence; Lunch with a Lawyer; increasing public service and pro bono;

Still to do: People's Law School

To die: Project Hope

Where are most significant areas that still need attention?

Enhancing membership – engagement with Wake County

Succession plan

Membership development/processes that work for us – evaluating those six months out

-is there a strategic way to go about that?

Looking at our lease with the North Carolina Bar Association – what's coming down the pike

Public service – is there a more strategic way to get people to volunteer; can we broaden the umbrella of people; expungement – very specific call for help; can we use social media presence; can we get people to ID with one service project

Next Steps

- Leadership Survey – Jennifer to conduct
- Outreach to key partners – Officers and Whitney to take the lead
- Resources for committee's review – Jennifer to assemble and share
- Preparation for our July 23rd call to start in early-mid July

Wake County Bar Association/10th Judicial District Bar

Critical Issues for Strategic Planning – A starting place for discussion

1. Membership & Membership Engagement

- Potential impact of an aging membership/lawyer population (implications for bar revenue, loss of leadership/institutional knowledge)
- Smart growth (not growth for growth's sake; growing at a rate where we can continue to serve members well and sustain the community)
- Implementation of the Uniform Bar Exam in 2019 – what does this mean for the lawyer population in North Carolina?
- What is the objective for membership given the realities outlined above?
 - Observation that engagement may be the best measure
- Should we be an exclusive membership organization or an inclusive membership organization? (e.g., role of paralegals)
- How can we best convey the value of our membership to existing and potential members?
- How do we engage members where they are?

2. Public Service

- How can we sustain the great public service work we've done already?
- What's our vision for the long-term viability and growth of the foundation? Is there an opportunity to do more in the community?
- Expungement clinics in southeast Raleigh in 2016 and 2017 were very successful. Are there other significant needs in the community that we can help address?
 - Possibilities that have been discussed: assisting legal aid with their family law/domestic programs, partnering on an effort to address homelessness, efforts to assist pro se litigants in the courts
- Self-help center – How does this fit into our overall public service effort? What are the resource implications?
- What else?

3. Membership Wellness (Work/Life Balance)

- Mechanisms for coping with stress/anxiety associated with the practice – do we want to create additional CLEs or other kinds of programming?
- Do we have the right mix of lawyer athletics programs?
- Do we want to grow the number of activities that are directed to families?
- What else?

4. Professional Development & Benefits

- What does our active membership put the most emphasis on?
- Do we have the right mix of CLE? Do we want to do more? Could we expand who we market our CLE to?
- Are the networking/community-building events doing what we want them to do? Do we have the right mix?
- What else?

5. Face of the WCBA/10th Judicial District in 2021

- Are our facilities the best place for us to conduct our business? (lease is up in 2020)
- To what degree do we want to continue to use NCBA systems? (financial reporting, HR/benefits)
- Investing of surplus/reserve funds—can we do more here (e.g., do we need a committee to oversee and report to the board)?
- How do we want to approach the changes we decide to make, especially relative to infrastructure? All at once, or bits at a time?
- What else?

WAKE COUNTY BAR ASSOCIATION/TENTH JUDICIAL DISTRICT BAR STRATEGIC PLANNING NOTES

INTRODUCTIONS – HOW DID YOU GET IN THE DOOR OF THE WCBA/10TH?

Maria – firm paid for both; group of lawyers who went regularly; entry points were the YLD and social events

Joe – same experience as Maria: YLD and social

Nancy – partner was very pro involvement; it was just expected; 1st experience was luncheons; opportunity to see other family lawyers; middle period where it was less a priority; entrees – CLE, professional development, social

Day – unspoken expectation at the firm; luncheons, etc. The then president asked her to lead leadership development

Judge Mangum – paid his own dues, friends who were lawyers, David Long – asked to do CLE RE discovery rules

David – strategic planning committee; then series of other committees; intimidated early on; time helped; built relationships; other people supported

Russell – solo paid dues; springboard to get access to CLE; financial constraints led me not to pay; back to private practice – firm priority to have someone in leadership; David Sherlin – ask RE Grievance Cmte

Julie – bigger firm, became involved in committees; firm was bought and new one didn't pay for dues; free CLE was a motivator to rejoin; ask RE leadership; socials not appealing because not a drinker

Ashley – Gaston County - everyone went to luncheon; small bar – people immediately ID you as new; immediately joined; luncheon – much more intimidating

*need to continue emphasis on welcoming culture

Edd – bar is just another area of intimidation, YLs going through the same thing; volunteering made it feel satisfying; couple of years not a member because of the expense; consider a public service/nonprofit dues level? Client development important; has to be a top-down priority to bring people in; can't just rely on people we know, though – have to extend further

James - Ed Yaskins got me involved; we believe our lawyers have an obligation; are we bought into serving the profession? YLD leadership important

*Can we do a better job connecting YLD and the big bar?

Stephanie – just started showing up to events; expressed interest in committees; meet people outside your practice

Jessica – firm had giants in the bar, but not such a strong culture now; asked to participate in Bar Awards; bar was an opportunity to plug back in – fun, creative

Evin – That's what you do; involved with NCBA as a student; Dean attends everything so he did, too

RECAP OF TRENDS/STRENGTHS/CRITICAL ISSUES

Membership and Member Engagement

- 10th Judicial District membership is still growing, but growth is slowing
- WCBA membership has generally increased year over year since 2011, but market share has dropped from 50% to 44% - different than national trend that has average membership declining
- Current risks: aging membership (?); smaller law school classes and impact of UBE

Age data

10th: 32% are under 35 National: 23% are under 35

7% are over 65 21% are over 65

How do we need to think about UBE and nonlocal folks?

We're missing larger firms and solos

Should we consider dues level for public service?

Membership Value

- Very significant engagement with the survey (719 responses)
- Gains in the value of WCBA membership over the last two survey cycles – clearly heading in the right direction

Strengths; CLE, public service efforts, emphasis on inclusivity and cultivation of new leaders, big gains on the communications front, connecting with new lawyers, wellness emphasis throughout, Bar Awards; staff and their longevity

Opportunities: Keep CLE strong – diversity of topics and quality; strengthen networking; engagement with committees; practice mgmt.; reputation of the profession; public trust and confidence; continue to emphasize wellness

Public service is an opportunity to attract various segments (e.g., corporate)

Public Service/Relationship with the Community

How can we sustain the great work we've done already?

Does this need the same emphasis? More/different emphasis?

Successes: Expungement clinics

Opportunities: Assisting legal aid, partnering on an effort to address homelessness, efforts to assist pro se litigants, public education RE courts/justice system

- Giving back as a profession
- Affects perception but is an outlet
- Strengthen what we already have
- Increase involvement, avoid complacency, expungement got media coverage; opportunity to switch up clinics to be responsive to community needs

Face of the WCBA/10th

Facilities

Infrastructure

VISION VALUES DISCUSSION

Group 1:

What do we want the WCBA/10th to preserve?

- Importance of public service
- Being a lawyer is special
- CLE offerings
- Member opportunities/involvement
- Member retention
- Non-partisan
- Inclusivity (diversity of views)
- Preserving our staff
- Involvement in governance activities in mandatory bar

What's different? What do we want lawyers to be saying about the WCBA/10th in 2022?

- Not static organization, flexible
- No decline in market share/growing membership
- Welcoming group
- We're relevant – providing real value for members in their practices and lives; meaning presence in the profession and community

What 3-5 values do we most want to exemplify as we carry out the work ahead?

- Integrity
- Service
- Collegiality
- Flexible/responsive
- Inclusive

Group 2:

What do we want the WCBA/10th to preserve?

- Values in professional creed (collegiality, etc.)
- Preserve and improve public perception
- Inclusivity
- Opportunities for professional development
- Genuine appreciation for member involvement

What's different? What do we want lawyers to be saying about the WCBA/10th in 2022?

- Inclusivity (demographic and professional)
- Less cliquishness
- Appeal to broader sector of bar
- Community presence
- Increase law school relationships (enhance Campbell, include others)

What 3-5 values do we most want to exemplify as we carry out the work ahead?

- Greater transparency (org+members)
- Greater active membership
- Connectedness
- Grow focus on service

Group 3:

What do we want the WCBA/10th to preserve?

- Inclusivity
- Collegiality
- Growth rate +
- Leadership
- Strong staffing
- Financially sound
- Innovative
- Recognition of our history/past

What's different? What do we want lawyers to be saying about the WCBA/10th in 2022?

- Inclusive atmosphere
- Sound with technology
- Adaptive
- Strong interpersonal relationships
- Preservation of history
- Contributing to increased professionalism and collegiality
- YLD/WCBA integration

What 3-5 values do we most want to exemplify as we carry out the work ahead?

- Inclusivity
- Nurturing/mentoring new talent and leadership
- Recognized by community
- Serving all of Wake
- Viewed as leaders in the bar and in our community

Membership

Workgroup: David, Ned, Russell

Objective

44% market share is the baseline goal; 50% is the audacious goal

Targeted outreach: former members, new lawyers (1-2 years), YLs, larger firms/managing partners, law students

Q: Do we create a dues level for public service? No, but make it attractive so they join (this is tricky; too many groups who could argue for lower dues, slippery slope)

Q: How do we connect with lawyers here through comity? Is this realistic? Do these attorneys really want to be connected to this community?

Potential strategies/pathways to success

Retention is key – member value (priority area 2) + member appreciation

Partnership with other bar groups

- Paralegals, CCLA, WCACTL, TLAN, Wake Women Attorneys, Conference of DAs, NCAJ, 50 yr attorneys, Inn of Court

Targeted outreach

- Use individual relationships to connect with firms that have less participation
- Challenge members to find members to join
- Avoid wasting \$ on projects that don't work
 - *hugs!

(Group did not prioritize)

Member engagement

Workgroup: Nancy, Day, Ashley, Sarah, Jessica

Objectives:

- Increase in #s of different individuals participating; increased %
- Everyone used their membership once
- Increased diversity of members
- Diversity in leadership continues and expands
- We have too many volunteers and have to find a new place for luncheons
- Building a diverse talent pool through entities
- Through survey Qs RE welcoming/involvement, etc.

Strategies organized in order of priority in each section

1. Increase involvement of new/different members
 - a. Active involvement (committees, leadership)
 - i. Tap into YLD **1A
 - ii. Bring YLD into greater WCBA fold **1B
 - iii. Committee coordination with YLD**1C
 - iv. Active recruitment
 - v. Personal touch  **2 (top two)
 - vi. Recognition of involvement **3
 - b. Passive involvement (attendance and activities)
 - i. More advance notice of events + more comprehensive list of events/dates
 - ii. Seek feedback from members
 - iii. More diverse offerings/events
 - iv. Personal touch/invite someone
 - c. Increase diversity of members
 - i. Expand/empower leadership committee
 - ii. Collaboration with other groups
 - iii. Targeted outreach
 - iv. Personal touch
 - v. Seek feedback from members
 - vi. Diversify location of activities
 - d. Welcoming culture
 - i. Identifying new attendees at events
 - ii. Focused effort on connecting with new attendees
 - iii. Follow-up on connection (e.g., phone call follow-up following)

Providing real value for members in their practices and lives

Workgroup: Colon, Maria, Evin, Whitney

Top strategies are starred

Potential strategies/pathways to success:

***Keep CLE strong

- Judicial participation
- Luminary lawyers
- Differentiate from online (Conversation/roundtable; make it worth coming in person)

Continue to develop /use tech to deliver value

- Practice management
- History videos
- On-demand templates

Continue wellness emphasis

- BarCares
- Athletics (p/u games)
- Public service

***Examining committee and YLD structure, maintenance, leadership, membership

***More focus on people just getting out law school

- PNA, CLE, practice management
- Mentoring
- Professionalism

Family time/wellness – public service + social

Nonlegal professionals – involvement and business development

Public Service/Community Service

Workgroup: Edd, James, Stephanie

This is about member engagement and service first; media coverage is secondary

Diversity of opportunities to engage our diverse membership

Potential strategies/pathways:

1. Leverage technology
 - a. Public service on homepage
 - b. Photos/visuals of service/recognition of volunteers
 - c. Listing of public service/pro bono opportunities with appropriate contact people + interest portal (also observations RE needs)

2. Flexible Service Day/Flagship Project
 - a. Meeting specific community needs
 - b. Media coverage (before and after and at)
 - i. Consider free advertising and
 - ii. Small budget free paid ads
 - iii. Do we consider a partnership with the media/tv
 - c. Increase involvement with law schools and encourage partnership
 - d. Options for people to create materials beforehand in case they can't show

3. Cross-pollination between groups
 - a. Internally (YLD)
 - b. Externally (LANC, NCBA, etc)
 - c. Foundation and recognition

Random ideas

- Personal notes to people
- CLEs for people at larger firms
- How can let people know about what committees do?
- Committees – individuals should have a specific job
- Connect CLE with membership (this is happening)
- Defined goals for board members in terms of outreach – more possible given new board selection
- Rethink mission statement