PENNSYLVANIA BAR ASSOCIATION
STRATEGIC DIVERSITY AND INCLUSION PLAN
A FRAMEWORK FOR INCLUSION AND GROWTH

The ultimate goal is to have a genuine, sustainable diverse and inclusive environment within the PBA and throughout its membership.

Background
The Pennsylvania Bar Association (PBA) has maintained a policy of not discriminating in employment and its activities. In April of 2006 it reaffirmed its non-discrimination policy and specifically adopted a written policy promoting diversity throughout the association. This diversity policy states that “The Pennsylvania Bar Association shall promote diversity in its activities, including the election of its officers, Board of Governors and House of Delegates, employment of its staff, composition of committees, sections and task forces, participation in meetings, seminars, publications and other educational activities it sponsors, and choosing its vendors. PBA shall not maintain or practice any policy which fosters or results in discrimination on the basis of race, color, religion, national origin, gender, sexual orientation, age, disability, or any other legally protected characteristic.”

To further the objectives of the Diversity Policy, in May 2010, the PBA Diversity Task Force was formed to examine the structure of the PBA and provide recommendations for ways to promote, increase, and maintain diversity in its leadership positions and membership throughout the organization. The Diversity Task Force was specifically charged with developing a diversity plan to recommend modifications to institutionalized practices and structural elements of the PBA to respond to the changing demographics of the legal profession in Pennsylvania and to improve opportunities for underrepresented members to participate in leadership roles within the association. There is general consensus that the culture of the PBA will need to change in order for it to truly become a more diverse organization.

In November 2010, the PBA Board of Governors unanimously approved the Diversity Task Force proposals for contracting with a consultant to act in the capacity of Diversity Officer and the establishment of a Diversity Team. The Diversity Officer serves as a facilitator/communicator, working with senior PBA executive staff and the Diversity Team to develop a process by which the various entities of the organization can determine their current member composition and develop procedures within their defined areas to increase diversity, inclusion, and provide growth opportunities for underrepresented groups and the general membership.

The structure of the organization requires that this framework be one which can be adapted for the environment in which it will be implemented. It is envisioned that the process will consist of three simultaneous prongs:

(1) Internal: encompassing the, Board of Governors, House of Delegates, PBA Members, staffs of the PBA and PBI, Committees, Sections, Commissions, Teams, Task Forces, institutes and related entities such as the Pennsylvania Bar Institute, Pennsylvania Bar Foundation, Conference of County Bar Leaders and Pennsylvania Bar Insurance Fund and Trust (hereinafter collectively “PBA Entities”);
(2) External: including county and local bar associations, affinity bar associations, and other lawyer or law-related entities;
(3) Outreach: consisting of law firms, other practice models, law schools, government and corporate lawyers, and the judicial branch of government in Pennsylvania.

It is important to establish strong communication and trusting relationships with the internal, external and outreach entities identified in (1) through (3) above. The resulting diversity and inclusion will ultimately benefit their membership; associates and partners; clients; students; and judges, and financial success of all entities. Different approaches will be necessary for more rural and less populated counties and zones than for the urban areas with more concentrated populations. In addition, the PBA can serve as a resource to counties to understand the changing statistical demographics in their respective counties, both current and projected for the future, and the relevance changing demographics have for practice.

I. ELEMENTS OF THE PBA DIVERSITY AND INCLUSION PLAN

As stated, the PBA Diversity Plan includes numerous objectives and broad goals. In addition, certain implementation recommendations are included as specific actions the PBA is encouraged to begin in the near future.

A. Encourage wide dissemination of the Diversity Plan within the PBA, and make the Plan publicly available by outlets including:

1. Membership-wide dissemination of the Diversity Plan after adoption, with a letter from the PBA President and PBA Executive Director.

2. Availability of the PBA Diversity Plan on the PBA website.

3. Distribution of the PBA Diversity Plan and the URL for the Diversity Plan on the website to all new PBA members.

4. Make the PBA Diversity Plan accessible to members with disabilities or visual/language barriers.

5. Make reference to the PBA Diversity Plan in member solicitation materials.

B. Promote and track diversity within the PBA’s leadership, including:

1. PBA officers (President, President-Elect, Vice President, Immediate Past President, Chair of the House of Delegates, Secretary, and Treasurer).

2. Board of Governors, including the committees of the Board of Governors.

3. All committees, task forces, commissions, teams, and institutes and the presidentially appointed leadership positions for these groups.

4. PBA House of Delegates.

   a. Composition of zone delegations
   b. Committees of the House of Delegates
5. Sections, divisions, and their components (officers and governing councils).

**ACTION RECOMMENDATION 1**

The PBA shall designate the Executive Director and Diversity Officer, with the assistance of the Diversity Team, to provide oversight of the implementation of this Diversity Plan. The Diversity Officer will assess the current levels of diversity within the PBA Entities and make recommendations for expanding diversity and inclusion. After the initial assessment, a survey and assessment will be conducted every two years to gauge the increased diversity and inclusion within each entity.

**C. Promote and track diversity and inclusion in the leadership nominating and leadership development processes throughout the PBA and its Entities:**

1. Require diversity and inclusion as an emphasis in all leadership nominating processes, including diversity among the nominating decision-makers.

2. Require diversity and inclusion as an emphasis in the presidential appointment process, with such diversity and inclusion to be measured, as far as possible, by consideration of data available regarding the PBA’s membership.

3. Encourage the Bar Leadership Institute, Leadership Development and Recruitment Committee, Diversity Team, and other PBA Entities to emphasize diversity and inclusion in leadership training and development programs.

4. Build diversity and inclusion-related sessions into committee and section conferences, leadership training efforts and PBA Annual Meetings.

**ACTION RECOMMENDATION 2**

The PBA shall review the composition of the House of Delegates and its Nominating Committee, including the number of positions reserved for women, minorities, persons with disabilities, and other underrepresented groups, and the manner of selecting the individuals for those positions, to ensure that the purpose of the Diversity and Inclusion Plan is being executed in the nominating process.

**D. Encourage adoption by PBA Entities of entity-specific diversity and inclusion plans, ensuring that such plans are consistent with the objective of this PBA Diversity and Inclusion Plan, or review and make appropriate modification of existing diversity and inclusion plans.**

1. Require biennial- review and updating of entity diversity and inclusion plans.
2. Recommend designation of an entity diversity liaison or other entity leader for PBA Entities with responsibility for ensuring implementation of entity diversity and inclusion plans and to interact with the Diversity Officer and Diversity Team.

3. Advocate wide dissemination of PBA Entity diversity and inclusion plans, particularly to new entity members.

4. Encourage the compiling and publishing of uniform statistics and analytical information on diversity and inclusion participation by each PBA Entity.

E. Promote diversity and inclusion in PBA membership

1. PBA marketing and membership solicitation materials should be inclusive and welcoming to diverse populations.

2. The PBA should compile and disseminate available statistics and other information on lawyers and law students – both PBA members and non-members – for each of the major diversity categories, and target the non-PBA members with membership solicitations.

3. PBA Entities are encouraged to engage in active marketing, recruitment and outreach efforts to affinity bars and other professional organizations, legal communities, and law schools to promote diversity and inclusion.

4. PBA Entities are encouraged to have formal and informal relationships with the diversity and inclusion-focused entities of the PBA and to appoint persons who will be active diversity liaisons.

5. The PBA will continue to explore additional membership campaigns designed to enhance and encourage membership.

ACTION RECOMMENDATION 3

The PBA shall create an event, award or other form of recognition to honor on a biennial basis the PBA Entity demonstrating outstanding leadership in diversity and inclusion related membership, leadership initiatives, and other diversity and inclusion efforts.

F. Promote diversity and inclusion in continuing legal education and other
programming, both live and virtual.

1. Partner with PBA Entities to implement strategic actions to continue to offer and increase opportunities to improve diversity and inclusion among speakers, moderators, and attendees.

2. Ensure program content appeals to diverse communities, consistent with sponsoring entities’ subject matter specialties, if any.

3. Encourage PBA Entities to explore partnering or co-sponsoring opportunities with affinity bars and other organizations that can contribute to diversity and inclusion.

4. Ensure that program venues and materials are accessible to participants with disabilities, or visual/language barriers.

5. Encourage PBA Entities to use program locations and venues, as well as social media, to enhance opportunities for participation by diverse lawyers and law students (e.g., locations that may minimize cost barriers; venues that may increase diverse community participation, for example in historically black colleges and universities; law schools, affinity bar association locations; and social networking sites that may increase marketing efforts to diverse communities.

### ACTION RECOMMENDATION 4

The PBA shall encourage all PBA Entities to increase opportunities for minority attorneys to participate actively in programming.

### ACTION RECOMMENDATION 5

The PBA shall present at least one CLE program focused on diversity and inclusion at each Annual Meeting.

### ACTION RECOMMENDATION 6

The PBA shall coordinate a centralized data collection and reporting center for diversity and inclusion information, combining data from PBA entity reports, Penn State Data Research Center and/or others as may be identified.
G. The PBA shall encourage diversity and inclusion in PBA publications (hard copy and electronic).

1. Implement strategic actions to increase diversity and inclusion in PBA members responsible for editorial policy and content of publications.

2. Ensure that the content of publications appeals to diverse communities, consistent with the sponsoring entities’ subject matter specialties, if any.

3. Ensure that the content of publications is accessible to persons with disabilities or visual/language barriers.

H. The PBA shall encourage diversity and inclusion in PBA entities’ “premier” events (e.g. annual awards dinners, luncheons, receptions, etc.) including:

1. Diversity of planning and award nominations committees.

2. Diversity in speakers.

3. Diversity of award recipients.

I. Develop tracking and reporting of progress in diversity and inclusion efforts, including:

1. Encourage robust participation and tracking by PBA Entities, using the resources and support provided by the Diversity Officer and Diversity Team and encourage greater promotion of the reporting process by PBA leadership and accountability by entities that require significant improvement in their diversity and inclusion efforts.

2. Provide widespread dissemination of a biennial PBA Diversity Report to PBA leadership and to all PBA entities, including in accessible formats for persons with disabilities or visual/language barriers and through posting on the PBA website.

J. Encourage PBA Entities to develop and enhance mentoring programs that target young lawyers and law students, and are designed to advance diversity and inclusion within these PBA Entities.

II. PROMOTION OF THE PBA DIVERSITY AND INCLUSION PLAN ACCOMPLISHMENTS

The PBA Diversity and Inclusion Plan accomplishments shall be promoted through various means, including the following:

A. Develop and prominently post on the PBA website information about successful diversity and inclusion programs and activities of the Internal, External and Outreach components.
B. Contribute content to pertinent legal and diversity publications to showcase PBA diversity and inclusion accomplishments.

ACTION RECOMMENDATION 7

The PBA and PBA Entities shall actively broadcast in all possible media diversity and inclusion advancements.