Two Case Studies of Successful Bar Association Strategic Planning

By Dr. John Park and Dr. David Leslie-Hughes

For over 30 years, strategic planning has been identified as a “must-do” activity for successful organizations. However, only a handful that engage in strategic planning can point to any significant impact of the process. Indeed, few organizations take the creation of a strategic planning process beyond an academic exercise.

In many cases the plans are written by a single person — i.e. an external consultant, a bar association’s executive director or by the current president of the board - and frequently result in a static document that resides on a shelf. In other cases, the strategic planning process and the accompanying written plan are little more than an academic exercise inevitably looked upon as a waste of time and energy by the majority of participants in the process.

However, usable strategic plans can provide direction that is integral to the growth and success of a bar association. In the current environment, the challenges before bar associations are many and various — the principal ones are declining or limited new membership enrollment, tight finances, relevance, usefulness, interesting and valuable purposes. County bar associations in Pennsylvania provide continuing legal education opportunities, serve as a communication link amongst the legal community, sponsor opportunities for attorneys to socialize with other attorneys and members of the court system in an informal environment and they engage in some public service. Each of these areas is important, but they have not solved the broader challenges facing bar associations in the future.

Changing the “corporate culture” of an organization is difficult — except where adverse times are being experienced and the discipline of a “business turnaround situation” is in progress. Normally, one can expect it to take a minimum of three years (more likely five) to change a mature culture 50 percent, and often as much as between eight to 15 years to “make over” such culture to the level of about 85 percent. Neither the Bucks County Bar Association nor the Lancaster Bar Association was or is in a crisis situation, but rather, their presidents, executive directors and long-range planning committee members were cognizant of a need to stabilize the above issues to ensure the long-term health and sustainability of their organizations.

The creation of an effective and viable strategic planning process and the accompanying strategic plan require ownership and leadership in the process by an association’s president, executive director and key board members. A strategic plan allows the organization to look beyond the single terms of each elected board president and committee heads (the annual “musical chairs” situation) and enables the setting of a long-term agenda for sustainability and growth of the organization.

The two mini-case studies that follow provide unique perspectives on the benefits of sound, well-thought-out strategic planning.

In the case of the Lancaster Bar Association, this has been a six-year process with the holding of three off-site retreats to date. From the beginning, the association sought to identify an outside partner to help it with its planning. The board has emphasized the criticality of strategic planning by requesting that all members of the board and members of the planning committee participate in off-site 1½-day bi-annual planning retreats held at the Penn Stater Conference Center Hotel at University Park. This planning process has been facilitated and supported by Dr. John Park, faculty member and associate director of Penn State’s Management

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Development Organization. Dr. Park has facilitated each of the strategic planning working sessions and provided follow-up support for the initiative.

Maintaining the relevance of the organization to its membership was the driving force behind the increased focus on strategic planning. Due to the complexities of dealing with a board comprised of young and senior attorneys as well as judges, an innovative planning process employing group-decision-making software has been utilized to involve all participants in a secure, safe, anonymous and objective planning environment. This methodology enables same-time, same-place access to ideas and thoughts in an efficient and effective manner using a local area network of personal computers. All participants in the process have the opportunity to contribute comments and ideas in an anonymous setting that neutralizes any protocol issues that surface when junior and senior members of an organization are brought together.

Several key best practices and lessons have surfaced during the Lancaster Bar Association’s strategic planning activities over the past six years. First, the planning process and accompanying strategic planning document provide a common thread for the board as the membership changes and evolves over time. Secondly, there has been a significant positive impact from having off-site retreats on the overall cohesiveness and productivity of the board. Thirdly, as a result of the board’s involvement in the strategic planning process, there has been an identification of several new ideas and initiatives that surfaced as the result of the structured brainstorming activities utilizing group decision-making software.

The Bucks County Bar Association on the other hand, started out by focusing internally — empanelling a Visioning Subcommittee to work on a “Constitutional Charter” for the association. This was initially planned as a document that would set out a motto, a vision statement, 15 mission statements, and 188 value statements (117 internally-focused statements and 71 externally-focused statements).

This comprehensive “Constitutional Charter” essentially set forth a draft statement of philosophy, purposes and values of the association. It covered the following 15 internal areas: organization development, marketing, administration, finance, legal/ethics/accountability, human resources, management structure, management philosophy/style, politics, communications, decision-making, information systems/effective implementation, general systems, inter-units/levels cooperation, pulse and image. The 11 external issues it tackled were: The Legislature — Harrisburg, the courts (district, CCP, and federal), administrative law agencies, court-related agencies and offices, state and county — rules and regulations, other professional associations, political subdivisions, county-based organizations, public service, industrial entities and the association’s history project.

The board of directors later approved the charter unanimously. Thereafter, a 1½-day “off-campus” retreat was organized to develop ideas of how to put the many elements of the charter into practice. The DuPont Hotel in Wilmington, Del., was selected: 68 people — including virtually all the directors, some judges, and many committee chairs attended in January of 2003.

The delegates were divided up into four groups under the overall direction of a moderator — the president of a neighboring bar association. Each group had a leader and a scribe. The delegates rotated through every specialist group and literally reviewed every single element of the charter during the retreat’s workshop sessions. In the end, hundreds of strategic ideas were developed by the attendees to implement the charter. The energy and excitement displayed by everyone was truly remarkable.

Developing, carefully and succinctly spelling out, and categorizing all these objectives is taking longer than originally expected. Defining and setting out “monitoring standards” to go with each, is time-consuming, hard and exacting work. It involves the defining of short-term objectives (to be achieved in less than one year), intermediate-term objectives (1-3 years), long-term objectives (4-8 years) and generational objectives (9-25 years). This part of the implementation process is still ongoing. The Bucks County Bar Association hopes to have a viable and detailed strategic plan in place and fully operational by the end of 2005. In the meantime, it embarked on its second retreat in April of this year at the Penn Stater — where the planning process on this occasion will be facilitated and supported by Dr. John Park.

What successes can the Bucks County Bar point to so far? (1) It has put on over 10 percent in new members; (2) all 43 committees are active — up from 16! and (3) both the board of directors and members now have a far greater sense of the overall ongoing “big picture” — particularly from the vantage points of finance, governance and scope of services and activities.

And so, what can it be said has been gained from all this activity? These two mini-case studies indicate that the Bucks County Bar Association and the Lancaster Bar Association are organizations whose leadership is effectively utilizing the strategic planning process to set the short, intermediate, long-term and generational directions of their organizations and are bringing their strategic plans to life to enhance their growth and sustainability.

Dr. John Park is a faculty member and associate director of Penn State’s Management Development Organization. Dr. David Leslie-Hughes is a practicing attorney on the board of directors of the Bucks County Bar Association, the chair of its Long-Range Planning Committee, vice president of the Charitable Foundation of the Bucks County Bar Association and executive chairman of the John Lloyd Huck Institute for Management Science Research.
Dauphin County Bar Association Honored for Pro Bono Work by Pennsylvania Bar Foundation

The Dauphin County Bar Association (DCBA) was honored by the Pennsylvania Bar Foundation with a Louis J. Goffman Award, which is presented to an individual and group or organization for outstanding pro bono work during the past year. The award was presented during the Pennsylvania Bar Association Annual Meeting in Pittsburgh May 4-6. The award is named for a late PBA president.

“The Pennsylvania Bar Foundation is pleased to recognize those individuals and organizations in the legal profession that work to make a difference in the lives of the less fortunate,” said Tim Riley, then-president of the Pennsylvania Bar Foundation. “The Dauphin County Bar Association is to be commended for its outstanding pro bono work. Its effort has set a shining example for other lawyers and organizations to follow across the commonwealth.”

Since its founding in 1991, the DCBA Pro Bono Program has been a leader in the delivery of legal services to the poor. Seventy-four percent of DCBA members participate in the program, and in 2004, DCBA attorneys donated 3,209 hours in assisting 393 needy clients.

To address the high demand for legal assistance, the DCBA hosts Custody and Divorce clinics for hundreds of people every year. At each clinic, three to five attorneys and one or two law students assist 10 to 20 people involved in custody or divorce matters. The petitioners are individuals who are income-eligible for free legal services. The Custody Clinics are held once a month and the Divorce Clinics are held on an as-needed basis.

The DCBA hosts a number of other programs designed to help the needy access free legal representation including, but not limited to: the Bankruptcy Project, which recruits Middle District bankruptcy attorneys to handle cases; the Lost Boys of the Sudan Project, which helps to address the unmet legal needs of 40 Sudanese orphan refugees whose parents were killed in their country’s civil war; and the Virtual Law Clinic, which pairs attorneys from the Office of General Counsel with pro bono cases.

In 2003, the DCBA renewed its commitment to pro bono activities by hiring a full-time coordinator to oversee the association’s pro bono efforts.

Public Image Campaign Extended: Offered Free to Local Bars for Three Years; Permission Granted for TV

As reported in previous issues of the County Line, the PBA has extended use of a special public education campaign to local bar associations that shares with the community the important work that lawyers do every day. A series of four ads, developed initially by the Virginia State Bar and purchased by the Pennsylvania Bar Association, have been customized to address legal topics of significance to citizens across Pennsylvania — adoption, starting a business, health care and elder law. The theme of the campaign is “You have rights. Lawyers protect them.”

The ads are available free to local bars for the next three years. If a bar association chooses to run the ads in a local newspaper, the PBA will size the ads and add the association’s name. The local bar will then be provided with an electronic copy of each ad to give to the newspapers. Local bars will need to contract directly with their area newspapers to have the ads placed and to pay for the placement.

In addition, the ads can be enlarged and used as posters and fliers and can be adapted for billboard use, transit advertising, radio, etc. The ads also can be used as covers of brochures. Local bars are more than welcome to use the text from the PBA’s “How A Lawyer Can Help You” brochure that is available on the PBA Web site at www.pabar.org/pdf/howlawyerhelp.pdf. The text of the brochure can be provided in Microsoft Word format.

New ad usage — The PBA recently received permission to adapt the ads for television use. The PBA can provide interested local bar associations with the guidelines for television usage of the ads.

Contact the PBA Communications Department at (800) 932-0311 and speak with Marcy Mallory (Ext. 2247) or Jennifer Branstetter (Ext. 2216) or with your questions regarding specific use of the ads and how to use the campaign in your area. You also can contact them via e-mail at communications@pabar.org.
Adams
As part of the “Stepping Out” program, the Adams County Bar Association Young Lawyers Division talked to students about their rights and responsibilities as adults. Thirteen attorneys presented the program at four county high schools, one county Children and Youth Services program and one Adams County Juvenile Probation program. They have been invited back for next year.

The Young Lawyers Division also offered a KidCare ID program at the 2005 Gettysburg Fireman’s Carnival.

Allegheny
Eleven years ago, the Allegheny County Bar Association and the Allegheny County Medical Society jointly developed a “Living Will and Healthcare Power of Attorney” form. Since that time, and prompted by recent nationally publicized cases, the form has been downloaded 7,500 times, and more than 245,000 hard copies of the form have been purchased by individuals and organizations.

Blair
The Blair County Bar Association awarded three $500 scholarships to graduating senior high school students. The recipients are academically superior students who have demonstrated achievement in leadership and citizenship.

Bucks
The Bucks County Bar Association has lined up more than 50 lawyer-volunteers to serve as a speakers bureau on all kinds of legal topics “to give back to the community we live in and improve the flow of information that’s available. This is about connecting people in need with lawyers who have the expertise they seek,” said Thomas Donnelly, co-chair of the association’s Community Education Committee.

Cambria
The Young Lawyers Division of the Cambria County Bar Association, dormant for many years, was re-organized this past fall with the encouragement and strong support of the CCBA’s board of managers. After selecting its leadership, the executive board adopted a series of bylaws, and re-organized its financial records.

Since the new year, the YLD has actively promoted professional and social involvement for its members. In January and February, they sponsored four nights of high school mock trials for Cambria and Blair County high schools. Local CBS and Fox news affiliates provided television coverage and the Altoona Mirror ran a front page news story.

In March, the YLD sponsored a team of lawyers in the Sixth Annual Corporate Trivia Challenge Competition, a fundraiser for the Johnstown Free Medical Clinic. In April, YLD members assisted Johnstown attorney Thomas Cartwright with the “Stepping Out” program.

Promoting professional development for its members, CCBA President Linda Rovder-Fleming presented a talk to the YLD on how to avoid debt issues as a young lawyer.

The YLD has also sponsored monthly happy hours for all members of the CCBA and their staff and all courthouse personnel. The functions have proven to be positive networking opportunities for both junior and senior members of the bar.

Carbon
The Carbon County Bar Association Young Lawyers Division, in cooperation with the Victims Resource Center, presented a Law Day program that included a mock rape trial.

Centre
The Centre County Bar Association is competing against other Centre county organizations for the first annual Macaroni Trophy. The organizations are collecting food for the State College Food Bank, with the award going to the organization that contributes the most.

Clinton
In observance of Law Day, the Clinton County Bar Association honored attorney Allen W. Lugg for his 50 years of practice in the county at a joint meeting of the bar association and the Lock Haven Kiwanis and Rotary Clubs.

Crawford
The Crawford County Bar Association has voted to start a pro bono lawyer-referral program for qualifying individuals. The association has put aside $15,000 to fund the program, and many members have already volunteered their services.

Cumberland
E. Robert Elicker II, Lisa Marie Coyne, Susan Hartman and Michael Sherer of the Cumberland County Bar Association were recognized for their leadership role in the “Partners for Students Program — Teaching Teenagers the Relationship Skills that Maintain Marriage.” More than 65 members of the bar association met with teachers and students as part of the program. Newsletter editor Kathleen D. Keating, was also honored for her decade of volunteer service.

Dauphin
Mediation was the theme of Dauphin County Bar Association’s 2005 Bench/Bar Conference. Presenters included Chief Judge Robert M. Bell of the Md. Court of Appeals; Rachel Wohl of the Maryland Mediation and Conflict Resolution Office; Mark A. Welge, PBA ADR Committee co-chair; and seasoned Dauphin County mediators. The event culminated in the “unveiling” of a new Local Rule of Court mandating good faith consideration of mediation in all civil cases filed in the county.

Following a performance of To Kill a Mockingbird to members of the DCBA at Harrisburg’s Open Stage, Professor G. Randall Lee of the Widener University School of Law facilitated a discussion on the legal and ethical issues facing Atticus Finch, the main character.

The DCBA Annual Law Day Dinner featured guest speaker Attorney General Thomas W. Corbett, Jr. Presentations included the 2005 DCBA Liberty Bell Award and the Central Pennsylvania Paralegals Association Scholarship Award.
Erie
The Erie County Bar Association hosted ABC News anchor and lawyer Jack Ford as its Law Day luncheon keynote speaker. Ford financed his law degree at Fordham University with money he won on the game show *Jeopardy*. He is an anchor/correspondent for *Good Morning America* and 20/20.

The ECBA and the Erie Runners Club also held their annual Law Day 5K Run/Walk. The race benefits the association’s “Attorneys and Kids Together” program and the Runners Club Scholarship Fund.

Greene
The Green County Bar Association sponsored a poster and essay contest in conjunction with Law Day.

Lackawanna
The Lackawanna Bar Association and the Diocese of Scranton celebrated their annual Red Mass in May. Historically, the mass is attended by judges, lawyers and legislators for the purpose of invoking blessing and guidance in the administration of justice.

In observance of Law Week, the LBA presented State Sen. Robert J. Mellow with the Chief Justice Michael J. Eagen Award, for a person in public service who has contributed to community development in an outstanding manner; and State Treasurer Robert P. Casey Jr. with the President’s Award, for distinguished service to the legal community. The association’s Young Lawyers Division held a Law Week Benefit, with proceeds benefiting the Alzheimer’s Association, Greater Pennsylvania Chapter.

Lawrence
The Lawrence County Bar Association sponsored a Law Day essay contest for college-bound seniors. The topic was “whether it was appropriate for the president and the United States Congress to grant the federal courts jurisdiction in the Terri Schiavo case.”

Members of the Young Lawyers Division of the Luzerne County Bar Association hosted a “celebrity” bartending event to raise funds for their local Society for the Prevention of Cruelty to Animals.

Monroe
The Monroe County Bar Association celebrated Law Day with a “Fairy Tale Trial.” Over 550 fifth grade students attended the trial, a criminal assault suit, *Commonwealth v Malfoy*, based upon the *Harry Potter* novels. Attorneys played the parts of victim, defendant and witnesses. The experience gave the students an insight into the workings of the judicial system apart from the “judge shows” they see on television.

A formal Law Day ceremony followed at which the MCBA presented an award to Danielle Dakis of Pocono Mountain East High School, who read her winning Law Day essay to the assembly. The theme of the essay was “Assaults Upon the Judiciary: What it May Mean to Our American System of Justice.”

The ceremonies concluded with the presentation of the Liberty Bell Award to Lester Abeloff for his valuable contributions to the community. The MCBA also held special recognition events for courthouse personnel and legal support staff.

The association also held its annual Law Day five-mile race/5K walk to benefit the Pocono Mountain Kidney Foundation.

The Washington County Bar Association conducted school visits, mock trials and free legal seminars. The WBA has initiated a pro bono program for low-income residents affected by non-criminal cases; and bestowed its Pro Bono Attorney of the Year award on Brian Petroski of Mount Pleasant.

The WCBA and the Washington & Jefferson College Pre-Law Society presented a screening of *A Shot in the Dark*, with Peter Sellers as the bumbling, disaster-prone Inspector Clouseau, accompanied by a demonstration of crime scene investigation procedures. Later, a screening of Alfred Hitchcock’s *The Birds* was accompanied by a discussion of emerging trends in animal law. The film series seeks to educate the public about the law in the context of popular film.

The WBA, along with the League of Women Voters of Washington County and the Washington Business and Professional Women, held a candidates forum for the county’s 10 judicial candidates.

Westmoreland
In observance of Law Day, the Westmoreland Bar Association conducted school visits, mock trials and free legal seminars. The WBA has initiated a pro bono program for low-income residents affected by non-criminal cases; and bestowed its Pro Bono Attorney of the Year award on Brian Petroski of Mount Pleasant.

The Young Lawyers Divisions of the Wilkes-Barre Law and Library Association/Luzerne County Bar and Lackawanna Bar Associations held their fourth annual mixer for attorneys from the region.

York
Forty members of the York County Bar Association participated in a production of “We Will Sue You” at the York Little Theatre. Proceeds benefited the York County Bar Foundation and the theatre.

The York County Bar Foundation marked Law Day with a luncheon honoring mock trial teams, winners of the student essay and poster contests and the Liberty Bell award winner, Michael Helfrich, Codorus Creek Improvement Partnership president. The speaker was Paula K. Knudsen of the American Civil Liberties Union. Knudsen is one of the attorneys representing the plaintiff in the Dover schools intelligent design case.
Pennsylvania Bar Institute Courses

Here is a listing of courses being offered by the Pennsylvania Bar Institute. Dates, times and locations are subject to change. Contact PBI’s Customer Service Department for more information at (800) 932-4637, (800) 247-4724 or (717) 796-0804.

Wilkes-Barre

The New Bankruptcy Law (live via videoconference); Wed., July 13; 8:30 a.m. to 4:00 p.m.; registration at 8:00 a.m.; 5 substantive/1 ethics CLE credits

Allentown
Bellefonte
Chambersburg
Doylestown
Easton
Erie
Greensburg
Honesdale
Indiana
Lancaster
Lewisburg
Mansfield
Media
Mill Hall
Montgomery
New Castle
Scranton
Stroudsburg
Towanda
Uniontown
Villanova
Waynesburg
West Chester
West Decatur
Williamsport
York

Fundamentals of PA Civil Practice & Procedure; Wed., July 20, 2005; 9:00 a.m. to 1:30 p.m.; registration at 8:30 a.m.; 4 CLE credits (3 substantive/1 ethics)

Malvern

Intellectual Property Licensing Agreements; Wed., July 20; 8:30 a.m. to 4:30 p.m.; registration at 8:00 a.m.; 5 substantive/1 ethics CLE credits

Harrisburg

8th Annual Elder Law Institute; Thurs., July 21 and Fri., July 22; 8:30 a.m. to 4:30 p.m. (each day); registration at 8:00 a.m.; 12 CLE credits

LIVE VIA SATELLITE

Allentown
Bellefonte
Chambersburg
Doylestown
Easton
Erie
Greensburg
Honesdale
Indiana
Lancaster
Lewisburg
Mansfield
Media
Mill Hall
Montrose
New Castle
Reading
Stroudsburg
Towanda
Uniontown
Villanova
Waynesburg
West Chester
West Decatur
Williamsport
York

The New Bankruptcy Law; Tues., Aug. 2; 8:30 a.m. to 4:00 p.m.; registration at 8:00 a.m.; 5 substantive/1 ethics CLE credits

Four County Civil Practice; Tues., Aug. 9; 8:30 a.m. to 12:45 p.m.; registration at 8:00 a.m.; 4 substantive CLE credits

Conservation Easements; Wed., Aug. 10; 9:00 a.m. to 12:15 p.m.; registration at 8:30 a.m.; 3 substantive CLE credits

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Send Us Your News

To submit news for The County Line, please use the enclosed “News and Views” form or contact PBA County Bar Services Director Arthur Birdshall at (800) 932-0311, ext. 2218; write Arthur Birdshall, PBA, PO Box 186, Harrisburg, PA 17108; or e-mail art.birdshall@pabar.org.

Friday, Sept. 2, 2005 is the deadline for the October newsletter.

County Bar Services Director: Arthur J. Birdshall
The County Line Editor: Patricia M. Graybill
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Unit County Dues Drop

Reminder: The dues drop date for PBA unit county members is July 31, 2005. Any attorney who is a PBA member from a unit county and who has not paid his or her 2005 dues by July 31 will be dropped from the PBA’s membership roles. If you have any questions regarding membership rosters or dues payments, please contact Cherie Reigel at the PBA at (800) 932-0311, Ext. 2287.

The new dues schedule was implemented in 2003, in the hope that by encouraging early payment of dues to both the local and the state bar, the PBA would help the local bar in obtaining its funds earlier in the fiscal year.

Mark Your Calendars

YLD Summer Meeting/ New Admittee Conference
July 29 -30, 2005
Rocky Gap Lodge & Golf Resort, Cumberland, Md.
YLD members are the future leaders of the bar. Invest in the bar by encouraging your young lawyers to attend.

PABE 2005 Retreat
August 14 -16, 2005
Bellaire Hotel, Erie

PBA Midyear Meeting
January 17 - 22, 2005
The Bellagio, Las Vegas

Additional information available at www.pabar.org or call (800) 932-0311.