

Strategic Plan
of the
Boston Bar Association

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Boston Bar
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A S S O C I A T I O N

Strategic Plan of the Boston Bar Association

Mission of the Boston Bar Association:

To advance the highest standards of excellence for the legal profession, to facilitate access to justice, and to serve the community at large.

In support of this mission, the Boston Bar Association will strive to:

- Foster an inclusive community of lawyers by improving the quality of life of lawyers as people, as members of a profession with longstanding values and traditions, and as citizen-lawyers.
- Serve individual members and provide them with the tools, relationships, opportunities and resources to develop successful careers and practices.
- Serve law firms, in-house law departments, non-profits and public agencies in and closely connected to the legal profession.
- Increase access to justice for all, provide for the fair and efficient administration of justice, and enhance the quality of the law.
- Ensure that the governance structure, capacity and operations of the BBA are dynamic and suited to the task of accomplishing the Association's goals and objectives without losing long-term focus.

Assessment of Strengths, Weaknesses, Opportunities and Challenges

The BBA has a large, deep and high quality membership, as well as a talented and committed volunteer leadership. Hundreds of volunteers have leadership roles in a vibrant section structure that produces CLE programs, brown bag lunches, public policy proposals and effective, sustainable pro bono programs. This structure has great flexibility, and new individual and institutional members are attracted to the diversity of projects, the ongoing need for volunteers and the organization's receptivity to new ideas.

The Association's reputation for excellence, thoroughness, community service and commitment to consensus-building has uniquely positioned it to be an effective advocate in public policy and a strong partner externally, especially in critical areas such as access to justice and the administration of justice. The organization is perceived within the profession, as well as by the judiciary and within government agencies, as neutral ground and an honest broker. The BBA and its charitable affiliate, the Boston Bar Foundation, are seen as committed to supporting pro bono and community service.

The BBA is truly at the cross-roads of the profession. It attracts the support of a wide range of institutions: law firms, in-house law departments, public agencies and legal services providers. These institutions – which include many of the largest firms in the Commonwealth – generously provide the critical financial support that has funded public policy, pro bono and community services projects.

The BBA has an experienced and highly regarded professional staff that is extremely effective at managing competing priorities within a shifting leadership structure. The Association also has a strong infrastructure, including a state-of-the-art data management system, a highly desirable address, and with the buildout of an additional floor at 18 Beacon Street, an adequate amount of space for meetings.

The BBA's membership demographics and program portfolio create a good opportunity for growth in working with national, local and regional firms on issues and agenda items that interest them. These firms have many young lawyers, an interest in service, pro bono and diversity, and a need to engage in the community. This offers the potential to connect generations of lawyers with each other in a way that will foster leadership development. Through the BBF and many of its public service programs, the BBA also has a natural capacity to engage in-house counsel.

The BBA has relationships that open numerous doors into the community through partnerships with other non-profits, legal organizations, business interests, government agencies, BBF grantees, and others. These connections can facilitate engagement and involvement of members on many fronts that will contribute to member satisfaction and institutional commitment, especially as both lawyers and firms work through personal and professional transitions.

Because of its strong and empowered volunteer structure, its reputation for effectiveness, and the very nature of law and the profession, the BBA always has more good and creative ideas than it can effectively support. Additionally, the Association has lagged behind the business community and firms in the use of technology to advance its mission.

The pressure on time and profitability, as well as increased competition within the profession, can lead to disengagement that could affect the BBA's ability to retain members – especially institutional supporters – and to lead. The Association must commit to focusing on the younger generation of lawyers and on diversity in order to ensure that it is developing leadership for the long-term.

Goals

I. The BBA will enhance its relationships with institutional members.

Some tactics throughout the strategic plan will enhance the BBA's relationship with our institutional members inasmuch as they will address the needs of individual attorneys. But ongoing institutional support demands specific tactics targeted to sponsor firms.

A. The BBA will study its interface with sponsor institutions.

The BBA should:

- i. Report on each sponsor's mission, objectives, internal structure and interest in bar activities.
 - ii. Assess how the BBA fits into each sponsor's business model.
 - iii. Recommend activities and programs that might better serve each sponsor's business objectives.
 - iv. Develop a format for routinely communicating with sponsor firm leaders about recent BBA activities and initiatives of value to sponsor firms, plus mention of what is on the horizon.
 - v. Enlist as active members in the BBA the administrators and staff professionals within each sponsor institution.
- B. The BBA will increase leadership's connections to sponsor institutions.**

The BBA should:

- i. Identify members in each sponsor institution who will serve as part of a network of in-firm ambassadors.
- ii. Annually offer all sponsors an opportunity to meet with a BBA leadership/staff team.

II. The BBA will promote opportunities for all lawyers to engage.

This goal addresses the BBA's need for continued focus on the needs of individual members, regardless of their practice setting or environment. Although this would seem to be self-evident, it has become clear throughout the planning sessions that, regardless of whether it is institutions or individuals who pay the bills, it is the individual members who do the work of the BBA.

- A. The BBA will streamline membership and structures to make it easier for all members to participate in and derive value from the BBA.**

The BBA should:

- i. Re-align its section/committee/program structure to reflect current practice trends and better serve members.

- B. The BBA will recognize that members expect opportunities for business development through BBA involvement.**

The BBA should:

- i. Work with sections, committees and leadership to develop a list of in-house law departments to solicit for participation.**
- ii. Work with sections and public service and pro bono leaders to identify potential partners in the business community for public service and pro bono projects.**

C. The BBA will leverage technology and communications tools.

The BBA should:

- i. Develop a comprehensive, integrated communications plan facilitating the delivery of targeted content across the wide range of BBA members.**
- ii. Maintain a technology infrastructure consistent with its educational functions, including fitting new space with appropriate technology.**

III. The BBA will set, manage and advance its organizational priorities at the Council level.

The Association has evolved in such a way that policy and priorities are set by many individuals and groups, including the Council, the President, the President-Elect, the Executive Committee, the sections, and the staff. This synergy has led to a creative and volunteer driven culture that has accomplished much. This culture is a critical component of the BBA's success and its appeal to members. However, such a loose structure can sometimes make it difficult for the Council to manage priorities, to create a culture of accountability, and to shepherd and preserve resources and political capital.

A. The BBA will increase the effectiveness of its governance structure and board leadership.

The BBA should:

- i. Appoint Council members to serve on the Finance, Audit, Public Policy and other operational Committees.**
- ii. Appoint an ad hoc committee to amend and/or redraft the BBA By-Laws.**
- iii. Review all proposals for new projects that are not otherwise part of the annual budget process.**

- iv. **Establish a mechanism for the periodic review of existing projects.**
- v. **Monitor the strategic plan and use the annual Leadership Retreat to report on the plan's progress.**

B. The BBA will set and evaluate fiscal targets that ensure the long-term health of the organization.

The BBA should:

- i. **Consistent with this plan and operational requirements, build and maintain adequate operating reserves through the annual budget process.**
- ii. **Establish a capital fund and expect to expend a pre-determined amount annually for building and technology maintenance and improvements.**
- iii. **Annually budget for an operating surplus.**

C. The BBA will maximize its revenues and evaluate existing programs to determine whether they should be enhanced, reduced or cut.

The BBA should:

- i. **Review the structure of the large BBA member events.**
- ii. **Review LRS to maximize effectiveness.**
- iii. **Review the BBJ structure to determine its effectiveness.**
- iv. **Determine the most effective approach to managing and funding the BBA's public service/ pro bono/ community education projects.**

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