

MSBA



MINNESOTA STATE BAR ASSOCIATION

Three-Year Strategic Plan for July 1, 2018- June 30, 2021

Adopted by the Assembly June 29, 2018

Mission

The Minnesota State Bar Association promotes the highest standards of excellence and inclusion within the legal profession, provides valued resources to its members, and strives to improve the law and the equal administration of justice for all.

Purpose of this Strategic Plan

- *To prioritize areas of attention, focus, and resource allocation over the three-year term of the Plan*
- *Provide specific, measurable, and realistic strategic goals to guide and inform MSBA decision-makers during the term of the Plan (i.e., Assembly, Section Leadership, Council, Officers, and Staff)*
- *Allow for tactical implementation decisions to be made by Plan executors*

Foundation of the Strategic Plan

It is as important as ever for the MSBA to understand its relevance and value to members if it is to continue to be a viable and vibrant organization. And while the MSBA has done a number of great things with and for its members in a variety of areas over many years, it is critical that MSBA prioritize the areas in which it can have the most impact and where it can capitalize on its unique association characteristics. This means the status quo cannot prevail.

The Strategic Planning Oversight Committee (the “Committee”) approached its evaluation by asking, “If the MSBA did not exist tomorrow, what if anything would be missed?” After thorough vetting and analysis regarding distinctive features and roles that MSBA has in comparison with other associations vying for overlapping members, this Plan identifies three critical and unique roles the MSBA serves: (i) providing a statewide network and connections for members, (ii) serving as the voice and spokesperson for the profession and legal system, and (iii) providing reliable practice tools and resources for our members that they cannot otherwise easily and economically access. These things are the **WHAT MSBA DOES** that needs to be prioritized, improved upon, and repeatedly communicated and demonstrated to members.

This Plan also identifies two important objectives that will facilitate the viability and vibrancy of the MSBA: (i) making operational and administrative changes that create greater efficiencies of services, more cost-effectiveness, and better coordination with other bar associations and partners, and (ii) incorporating diversity-and-inclusion best practices into the way MSBA operates, provides services, and develops leaders. These things are the **HOW MSBA DOES WHAT IT DOES**.

The above objectives surrounding both the WHAT and the HOW of MSBA require changes in approach, volunteer discipline, budgeting, and management. It requires that the MSBA makes decisions during the term of this Strategic Plan regarding initiatives, programming, staff resources, budgeting, and allocation of time that support and prioritize the following five strategic objectives:

- **MSBA will expand upon and improve how it uniquely connects and provides a statewide network for all of its members.**
- **MSBA will serve as the voice and spokesperson for the legal profession and justice system *and* proactively communicate those related positions and actions to its members.**
- **MSBA will provide reliable practice tools and resources to practicing members that they cannot otherwise easily or economically obtain or access.**
- **MSBA will incorporate diversity-and-inclusion best practices into the way the MSBA operates, provides services, and develops leaders.**
- **MSBA will make operational and administrative changes internally, and in collaboration with other bar associations, to realize greater efficiencies, cost-effectiveness, and provision of better service to members throughout the state.**

The identification of these priorities in the Plan does not intend to suggest that these are the only valuable things that the MSBA does or has done.¹ But the Plan does intend to say that the MSBA's ability to thrive under the current competitive environment, changing demographics, and declining membership trends, requires focused and targeted attention to the above objectives,² even to the exclusion and/or reduction of resources and time in other areas in which MSBA has been involved in the past. Successful implementation of this Plan will also necessarily result in the shifting of some programs, services, and initiatives, some of which may be accomplished through greater collaborations with our partner organizations (e.g., Minnesota CLE, Amicus Society, Minnesota State Bar Foundation).

¹ See attached identification of various important roles the MSBA plays from which the priorities of this Plan were developed.

² See attached SWOT (Strengths/Weaknesses/Opportunities/Threats) analysis.

**2018-2021 Strategic Priorities and Goals to
Achieve Mission & Enhance Value to Members**

I. PRIORITY: MSBA SERVING AS A STATEWIDE NETWORK AND CONNECTOR

GOAL: MSBA will expand upon and improve how it can uniquely connect and provide a statewide network for all of its members. The targeted enhanced connections will focus on the following relationships: member-to-member, member-to-judiciary, law school students-to-MSBA, district bar associations-to-MSBA, and affinity bar groups-to-MSBA.

STRATEGIC ACTION:

In addition to tactics devised during the term of this Plan, the following specific strategies will be executed to address this priority:

Greater Minnesota-District Bar Relationships with MSBA

1. MSBA's Council, Officers, and staff will implement the One Profession program, beginning in 18-19, in collaboration with the judicial districts and district bar associations to bring together all lawyers in a specific judicial district for one day each year to focus on the some of the challenges facing the legal profession. There will be eight One Profession programs annually, three of which will be preceded by (i) the MSBA Council holding its monthly meeting at the Greater Minnesota location the day before the event, and (ii) an evening dinner with local district bar leaders and Council members. MSBA will demonstrate its ability to serve as a resource for the district bars in providing quality educational programming, as well as inform attendees about current programs, sections, and services.
2. MSBA Officers, Council, and staff will coordinate and collectively ensure attendance at each of the District Bar's annual meetings between April and June of at least two designees who will report back to Council about annual meeting.

3. MSBA Outstate Section, New Lawyers Section, Technology Committee, and staff will continue developing the job network project to connect law school students and new lawyers with Greater Minnesota employment opportunities over the next three years and to assist more senior attorneys in Greater Minnesota with succession planning issues.
4. Each year of the Plan, D & I Council and Director will organize and host at least one D & I program/CLE/event in Greater Minnesota to allow opportunities for engagement on D & I issues.

Member Connections

5. MSBA will institute the One Profession program in collaboration with the judicial districts and district bar associations to bring together all lawyers in a specific judicial district for one day to focus on some of the challenges facing the legal profession. MSBA will demonstrate its ability to connect bar leaders across the state and to connect local members in the district including private practice attorneys, county and city attorneys, public defenders, corporate counsel, unemployed lawyers, and new lawyers. See #1 above.
6. Each of the MSBA's 37 Sections will undertake efforts to increase participation and involvement by Greater Minnesota attorneys in the respective Sections by doing the following;
 - (a) Each year of the Plan, having at least one Council meeting in Greater Minnesota, and having at least two CLEs or programs accessible by satellite office location or through webcam/cloud meeting capabilities.
 - (b) Each section will send a representative to at least one One Profession event during the time covered by this plan to tell attendees about the section and opportunities.
7. By 2019-20 bar year, MSBA's Online Services Director and Technology Committee will develop compatible mobile app that facilitates easy accessibility of information and events to members and amplifies usefulness of existing online communities.

8. Efforts to capture new attorneys as members as early as possible in their career (i.e., right after bar admission) is critical to MSBA's viability. During the term of this Plan, the 0-6 Initiative enacted during the last Strategic Plan should be continued with staff-recommended adjustments. MSBA staff and Membership Committee will track membership retention and engagement of 0-6 members and provide a report to Council annually on statistics measuring success of retention efforts.
9. In 2018-19, the MSBA Officers and Council members will coordinate to collectively attend each of the MSBA's Sections' Council meetings one time during the bar year to connect, report on MSBA issues/happenings, and to give Sections the opportunity to voice concerns and comments for the Council's consideration. At the end of the 2018-19 bar year, the Council will review and decide whether to continue with this goal and/or revise it.
10. During the term of this Plan, the MSBA Solace Committee will implement and promote the SOLACE program (Support Of Lawyers/ Legal Personnel – All Concern Encouraged), an email-based network to provide critical assistance in various forms to members (and individuals working with members or in the court system) in time of dire need or personal disaster. The SOLACE Committee will provide an annual report to the MSBA regarding program impact.

Relationship with Judiciary

11. The One Profession programming will involve all levels of courts. The programming will be scheduled to accommodate judicial district meetings to maximize participation and attendance by judges at these programs.
12. In 2018-19, MSBA will develop and implement a plan to improve upon annual convention forum serving to convene and connect attorney members with members of the judiciary through some combination of judicial speakers, specific social event, or other means (even if additional expense to MSBA to do so).
13. By January 1, 2020, MSBA Staff, Sections, and Membership Committee will develop and pilot some potential signature MSBA

event that engages members of the statewide judiciary and MSBA members to convene and engage.

Relationship with Law Students

During the previous three years, MSBA lead an initiative to engage law students. During the term of this Plan, it is important to measure the results of that work to determine if the MSBA is able to achieve any return on that investment by way of law students converting to paying members of the MSBA.

14. MSBA staff and Membership Committee will track membership of law students falling under the previous Law Student Initiative and provide report to Council annually on statistics measuring success of retaining law students as paying members of MSBA.
15. During the term of this Plan, the Law Student Initiative enacted during the last Strategic Plan should be continued with staff-recommended adjustments.
16. MSBA staff and Outstate Section will continue with Outstate job network project over next three years. See Goal #3 above.
17. In 2018-19, at least 50% of MSBA Sections will provide at least one program a year directed at law students or otherwise have an affirmative plan of engagement for law school students within their Section. By 2019-20, at least 70% of MSBA Sections will provide at least one program a year directed at law students or otherwise have an affirmative plan of engagement for law school students within their Section.
18. During the term of this Plan, MSBA staff and New Lawyers Section will have law student liaisons from each school and define and strengthen the role of those law student liaisons to help make MSBA more visible to law students and future membership more likely.
19. During the term of this Plan, the D & I Director will regularly meet with law school staff charged with D & I initiatives and identify specific ways in each year to incorporate law student involvement in D & I initiatives.

II. PRIORITY: MSBA SERVING AS VOICE AND SPOKESPERSON OF THE PROFESSION AND JUSTICE SYSTEM

GOAL: MSBA will continue to serve as the voice and spokesperson of the profession and justice system, but will make efforts in this regard more visible and known to members and increase the spheres of influence in which MSBA can play this role.

STRATEGIC ACTION:

In addition to tactics devised during the term of this Plan, the following specific strategies will be executed to address this priority:

1. During the term of this Plan, MSBA and its President will issue statements as appropriate on behalf of Association in response to current events in order to support the rule of law, equal administration of justice for all, and diversity and inclusion in the legal profession.
2. In 2018-19, the MSBA will enlist a committee or task force to consider and develop initiatives to address need for legal representation. By June 2019, MSBA Staff, Council, Membership Committee will develop PR campaign regarding the need for legal representation/value of lawyers/role as problem-solvers to combat the DIY mentality affecting PeopleLaw segment of membership. (This may present an opportunity for collaboration and joint efforts with other bar associations and partners as well.) The campaign will be implemented in 2019-20.
3. In 2018-19, MSBA staff, Officers, and Council will develop and implement proactive communication plan related to MSBA positions, comments and briefings to the Court, and lobbying efforts relating to the profession and diversity within it, court rules, and laws so that members see and understand how MSBA serves as spokesperson for profession. This may include elements of visibility and communications through MSBA website, emails, mobile app, and whatever other modes are determined best for this goal, as well as use of communications technology to involve more member lawyers in formulating MSBA positions and policy.
4. In 2018-19, MSBA staff, Officers, and Council will develop and implement a proactive communication plan related to the policy work the MSBA does at the courts and in the Legislature relating to access-to-justice and pro bono

issues so that members see and understand how MSBA is a voice for justice and related funding. This too may include improved visibility and communications through website, emails, mobile app, and whatever other modes are determined best for this goal.

III. PRIORITY: MSBA PROVIDING VETTED RELIABLE PRACTICE TOOLS AND RESOURCES TO MEMBERS THAT ARE NOT OTHERWISE EASILY OR ECONOMICALLY AVAILABLE.

GOAL: MSBA members will find additional value in membership from unique practice tools and resources available to them as a benefit of membership. The tools and resources offered through MSBA membership should be focused on ones to which members do not otherwise have easy or economical access.

STRATEGIC ACTION:

In addition to tactics devised during the term of this Plan, the following specific strategies will be executed to address this priority:

1. MSBA Staff will identify and vet at least three potential *MSBA Advantage* partners each year to increase the Advantage Program offerings and benefits to members, while simultaneously doubling the non-dues revenue from such programs for MSBA by July 2021.
2. In 2018-19, the MSBA will enlist a committee or Task Force to analyze member usage data related to the various practice tools and online resources in which the MSBA commits a significant budget and to prioritize these member services and potential others needed. This analysis includes, but is not limited to mndocs, practicelaw, Fastcase, Online Communities, and MN Find a Lawyer. In addition to staff, the committee will include a cross-section of members from the Membership Committee, Technology Committee, Solo and Small Firm Section, Practice Management and Marketing Section, and the Outstate Practice Section. A report will be provided to the MSBA Council and Operations Committee by February 2019 to allow for findings to be utilized in following year's budgeting process and to identify ways to enhance value of resources and tools offered.

IV. PRIORITY: MSBA WILL INCORPORATE DIVERSITY-AND-INCLUSION BEST PRACTICES INTO THE WAY THE MSBA OPERATES, PROVIDES SERVICES, AND DEVELOPS LEADERS.

GOAL: MSBA will be a model for diversity within all areas of the organization internally and support the work of Minnesota's affinity bar associations externally.

STRATEGIC ACTION:

Many of the tactics to accomplish this goal during the term of this Plan are set forth in detail in the separate "MSBA Diversity and Inclusion Strategic Plan" ("DISP") document. The following strategies from the DISP are identified to further highlight and emphasize that they are part of MSBA's comprehensive strategic plan:

1. In 2018-19 MSBA staff and D & I Council will educate and promote the business case for diversity in private practice, legal aid, corporate legal departments, and government employer environments. (See DISP, Category 1).
2. During the term of this Plan, the MSBA President and Council will conduct Council discussions in a way that limits interruptions and which maximizes the participation of all Council members. (See DISP, Category 2).
3. MSBA Council will devise a plan to ensure it is represented at the annual events of Minnesota's affinity bar associations and community partners and use these opportunities to pitch MSBA membership, engagement, and leadership. (See DISP, Category 2).
4. MSBA Council will devise a plan to ensure it is represented at the annual events of Minnesota's affinity bar associations and community partners and use these opportunities to pitch MSBA membership, engagement, and leadership. (See DISP, Category 2).
5. During the term of this Plan, the D & I Director and MSBA President will attend D & I Council meetings. (See DISP, Category 2).

6. During the term of this Plan the D & I Director will draft committee composition matrix to be used by all levels of leadership at the MSBA when making leadership and committee appointments to ensure a diverse composition of committee members and perspectives. The success of committee section composition being diverse will be reported to the Council mid-year each year of the Plan. Similarly, a “nudge sheet” will be utilized by the Elections/Appointments Committee to help interrupt bias in elections/appointments by this appointing body of MSBA. (See DISP, Category 3).
7. In 2018-19, the D & I Director, D & I Council, and Elections/Appointments Committee will collect baseline data to develop and implement a system to track diversity in candidates, nominations, and appointments. In 2019-20, this tracking system will be implemented. (DISP, Category 3).
8. During the term of this Plan, D & I Director, Section Staff, and Section Councils will work together to ensure appointments of D & I liaisons in each section who will lead the section’s diversity planning and implementation. (See DISP, Category 4). Mid-year each year, the D & I Director will report to the Council the status of section D & I liaisons.
9. In 2018-19, D & I Council & Director will invite affinity bars and community partners to co-host conference related to D & I in Minnesota’s legal profession. (See DISP, Category 5).
10. During the term of this Plan, the D & I Director will continue to facilitate and convene quarterly affinity bar presidents meetings to facilitate information-sharing and collaboration between organizations. (See DISP, Category 6).
11. The D & I Director will conduct annual anonymous survey of staff to get feedback about staff perceptions of D & I progress in the workplace and concerns/ideas (See DISP, Category 7).
12. During the term of the Plan, the D & I Director, MSBA Officers, and Council will continue to increase members’ demographic self-identification to better understand the make-up of our membership and

13. Decide when and how to work with affinity groups to advance this initiative further. (See DISP, Category 8)
14. During the term of the Plan, MSBA Director of Publications and Publication Committee will increase the diversity of authors across all subject matters throughout *Bench & Bar* magazine and blogs by 10% each year. A report on the success of these efforts will be made to the Council in its May meeting annually. (See DISP, Category 9).

V. PRIORITY: MSBA WILL MAKE OPERATIONAL AND ADMINISTRATIVE CHANGES TO CREATE GREATER EFFICIENCIES, COST-EFFECTIVENESS, AND COORDINATION WITH OTHER BAR ASSOCIATIONS AND PARTNERS.

GOAL: MSBA will demonstrate itself as a model innovative association that veers from traditional bar association operations models to adapt to changing needs and trends in the profession.

STRATEGIC ACTION:

In addition to tactics devised during the term of this Plan, the following specific strategies will be executed to address this priority:

1. MSBA executive leadership will coordinate with other associations sharing similar operational functions to develop potential shared staffing opportunities that maximize administrative efficiencies while improving programming and service to members.³

2. During the term of this Plan, the MSBA staff will invest in technology to enable staff to:

- facilitate the automation of certain administrative staff tasks that have traditionally been more labor-intensive to allow staff to re-allocate their time to other member services
- segment and personalize its communications to members in the interest of relevancy and to minimize the volume of communications sent to all members (e.g., AI-based, customized and streamlined communications to members)

3. During 2018-19, MSBA staff, Council, and Assembly will identify ways in which MSBA can provide support and serve specific needs of Greater Minnesota attorneys and districts that are not currently being done (e.g., increasing succession planning issues for outstate practices). By no later than 2019-20, some of these new methods of support will be implemented.

³ See attached notes from Strategic Planning Committee vetting the important characteristics needed in administrative leadership that may veer from traditional model.

4. By 2018-19, MSBA's website (and any mobile apps) will accomplish the following features that will both enhance usability of website by members and reduce staff time in responding to members looking for information:

- clearly communicate value of MSBA by making apparent the mission, positions/policy advocacy by MSBA, tools and resources available to members
- make practice tools easily found in one portion of website
- clearly identify leadership and contact information for Officers, Council, Sections, Committees, Assembly, Staff and paths to leadership
- provide for easy registering for events and membership

5. MSBA will achieve 80% online dues payment by end of this Plan.

6. During the term of this Plan, MSBA staff will study the issue of better integration of the lawyer referral services offered by state and district bars and make a recommendation to the MSBA Council regarding opportunities to improve and/or coordinate these services to members.

7. During the term of this Plan, MSBA leadership and Council will comprehensively study MSBA's certification/credentialing services to determine if there are modifications that allow broader benefit to members, efficiencies in coordinating with partner organizations, and/or possible revenue generation. A report and recommendation will be made to Council regarding this service.

8. The Amicus Society was set up in 2015 to serve as a related organization focused on public education campaigns, promoting and supporting provision of legal services to persons without sufficient means, and promote and administer charitable and educational activities and programs. To the extent that MSBA has programs or services that fall under the rubric of Amicus Society, MSBA staff, Council, and Assembly will take steps to transition them to this partner.

Conclusion

One of the hardest tasks in developing this Plan was for the Oversight Committee to prioritize the many functions that the MSBA has historically played and to identify which ones are most important for the next three years. As stated above, this will require adjustments to personnel resources and budgeting. In addition, this Plan requires continuity of focus over the next three years, recognizing that different priorities may emerge in subsequent years.

This Plan is not intended to be aspirational in nature, but to provide S.M.A.R.T. (Specific/Measurable/Assign Responsibility/Realistic/Timetable) goals and direction. This Plan is purposely different and more detailed than the last MSBA strategic plan. This Plan allows flexibility in how it is implemented and what ideas might be generated to accomplish the identified priorities, but it intends to provide sufficient direction for the MSBA Assembly, Council, Officers, Sections, and staff to know how to advance the priorities, as well as aid in accountability for the Plan's execution. The Oversight Committee intends for this Plan to be particularly helpful in view of goals and opportunities relating to modification of operations and administration.

Finally, this Plan recognizes that membership is critical to the MSBA. And although MSBA hopes to maintain the amount of current members (approximately 15,000) and/or increase that number over the term of this Plan, successful achievement of this Plan is not based on membership numbers, but instead successful achievement of the goals stated herein. If these goals can be achieved, *which include making members and the legal profession aware of the MSBA's strides and achievements of these goals*, it is believed that there will be a corresponding positive impact on membership. In that way, each of the priorities and goals contained herein are directed at and impact membership.