



Staff Memorandum

EXECUTIVE COMMITTEE Agenda Item #17

REQUESTED ACTION: None, as the report is informational.

At the November 4, 2011 meeting, the Executive Committee approved the report and recommendations of the Special Committee on Strategic Planning. At that time, a Working Group comprised of members and staff was designated to develop an implementation plan for the report. The attached report lists the objectives and strategies that were approved in November, followed by action steps which the Working Group believes are realistic and achievable with adequate financing and staffing resources.

The report will be presented by David P. Miranda and Sharon Stern Gerstman, co-chairs of the Special Committee on Strategic Planning.

**NEW YORK STATE BAR ASSOCIATION
STRATEGIC PLANNING COMMITTEE**

The objectives and strategies presented below are followed by action steps that the Working Group* believes are realistic and achievable with adequate financial and staffing resources. As part of the review process, we recognize that staffing needs and budget implications will need to be evaluated based on priorities and the final action steps selected.

I. MEMBERSHIP VALUE

- A. Objective: Increase the value of the Association to members and prospective members.**

Strategies:

- 1. Expand members-only employment resources, mentoring programs and networking opportunities, to improve the value of Association membership.**

Assumptions & Rationale: The NYSBA value proposition is key to membership recruitment and retention. The 2010-11 Member Satisfaction Survey and Focus Group Reports revealed a high level of interest among members and prospective members in greatly enhanced employment resources, the establishment of mentoring programs (for new attorneys as well as those in mid-career transitions), and expansion of opportunities for networking (in-person events and online).

Expand members-only employment resources

Current Situation:

The Association has an agreement with JobTarget to provide a fully functional, online, NYSBA branded career center. JobTarget provides career center services for hundreds of associations including many bar associations. The bar association sites are linked; for example, a job posted on the Nassau County Bar Association career site will appear on the NYSBA site. Additionally, NYSBA has a revenue share agreement with JobTarget and earns in excess of \$15,000 per year. The service is free to all attorneys, but NYSBA members receive additional benefits. Online job service boards are set up so that one side of the equation generates revenues and pays for the service. The JobTarget model charges firms and hiring organizations to pay for the service of posting their open positions. Based on input from the Committee on Lawyers in Transition, the JobTarget sit is currently configured to show positions in New York, contiguous states,

Washington, D.C., Florida and California. In order for the firms to be motivated to pay for a particular job posting service, there must be a large pool of candidates to view their positions. This is accomplished by providing the service free of charge to the job seekers, and by including other legal positions such as paralegals. Members receive additional benefits such as being able to view new job postings for two weeks before they are viewable by non-members. On average, more than 2,000 positions are listed on NYSBA's JobTarget site.

Jessica Thaler, chair of the Lawyers in Transition Committee (LIT), conducted a review of NYSBA's JobTarget resources with committee participation and compared the site to others that are available online. Ms. Thaler presented a memo from the LIT Committee to staff and this memo was forwarded to the Electronic Communications Committee (ECC – John Szekeres, chair) for consideration during their fall meeting. The ECC agreed to expand the number of states included in the job search and staff made additional improvements to the job search parameters as requested. The ECC also agreed that the Association should continue to work with JobTarget and should not seek to create an independent site at this time. An additional observation by the LIT Committee was that the resume and coaching resources provided by JobTarget have not been vetted by the Association and are not specific to the legal profession.

Jessica Thaler and John Szekeres have discussed ways the Association might provide resume and coaching resources.

Action Steps: *Expand members-only employment resources ** (MIS, LIT, ECC; LPM, MKT)*

1. *Work with JobTarget to evaluate the effectiveness of the JobTarget career resources, and determine how many users found jobs or filled positions.*
2. *Work with JobTarget to explore the feasibility of practice-specific job alerts posted to the Section homepages.*
3. *Explore additional job search engines and/or resources.*
4. *Establish NYSBA Job Search support groups; encourage independent member groups conducting bi-weekly "meet-ups" to share, for example, peer-coaching, weekly "home-work" assignments to help job-seekers on regional basis.*
5. *Contract with independent "job coaches," perhaps on a retainer basis, to provide active job-hunting assistance, weekly tips, etc. as a general member benefit.*
6. *Explore the establishment of a "Job-Services Resource Guide," similar to the NYSBA Vendor Guide, to provide a listing of job service practitioners, such as recruiters and coaches.*
7. *Encourage the LIT Committee to produce more employment related conferences, which they have done successfully in the past.*
 - a. *Increase the number of web conferences to 12 per year*
 - b. *Restrict live events to members only; recruit from non-member participants in webcasts*
 - c. *Develop employment resources including resume templates, cover letters, etc.*

- d. Investigate the feasibility of LIT sponsored and vetted legal job coaches*
- e. Improve marketing of the LIT conferences; consider 10 minute pod casts of helpful tips from previous programs*

Expand members-only mentoring programs

Current Situation:

A number of Section-based mentor programs and initiatives are available as described below.

- The Corporate Counsel Section is in its sixth year of the Kenneth G. Standard Diversity Internship Program. The program goals are to increase the representation of lawyers and students from a diverse range of backgrounds in corporate legal departments, and to provide students from a diverse range of backgrounds with an opportunity to experience in-house legal practice. Through the Program, student interns are provided a meaningful and appropriately supervised work experience by host companies working in partnership with the NYSBA Corporate Counsel Section's Diversity Internship Committee.
- The Commercial and Federal Litigation Section rolled out a mentoring initiative in October of 2010. The goal of this initiative is to provide newer attorneys with the opportunity to build relationships with seasoned practitioners, thereby creating a meaningful avenue for professional development. Under this program, newer lawyers were asked to submit requests to be matched up with a mentor. The selected mentees and mentors met at a gathering at Lincoln Center and on other dates and times statewide. The initiative has two other components. The first is the creation of an online video library that consists of short presentations by seasoned practitioners on a variety of practice-oriented topics. The second component is continuing legal education. Over the past few years, in an attempt to attract newer attorneys to its annual Spring Meeting, the Section has offered meeting participants a series of practical panels designed specifically for newer lawyers. These panels, which provided transitional CLE credits, covered topics such as motion practice, e-discovery, trials and appeals. The program constituted a virtual primer on litigating commercial cases in the New York State and Federal courts and provided participants with the requisite number of transitional CLE credits for one full year.
- The Elder Law Section has announced its mentorship program which will pair an experienced elder law attorney with a Section member new to the practice of Elder Law. The mentoring program will provide: a one-on-one mentoring experience; opportunities to work together on Section programs, reports and events that will enhance careers and the profession; and continuing legal education programs tailored to new Elder Law attorneys. Section Committee Chairs are poised to welcome mentor/mentee pairs to work together on committee projects, reports, events, etc. The Section is also considering "tracks" of CLE programs at upcoming Section meetings that will be suitable for mentors/mentees to attend

together. The Elder Law Section hopes that there will be at least one communication per month, whether in person, by telephone or email, to keep continuity and maximize the value to the participants.

- The Intellectual Property Section has a Young Lawyer Fellowship Program and requests its members to apply for one of the two, two-year positions as “NYSBA Intellectual Property Law Section Fellows.” The fellowship is designed to provide leadership opportunities for young lawyers, and reflects the Section’s long-standing commitment to increasing the participation and retention of young lawyers in Section activities. Through this program, the Section hopes to develop future leaders of the Section. A critical feature of the Fellowship is a commitment by the Fellows to take advantage of the many opportunities awarded to them under the program, such as: free admission to many of the Section’s meetings including the Section’s Annual and Fall Meetings, for two consecutive years; involvement in the activities of the Young Lawyers Committee; invitations to all of the Section’s networking events, where the Fellow can promote the recruiting of new members; invitations to some of the Section’s Executive Committee meetings, to relate their experience as a Fellow; opportunities to publish in the Section’s newsletter Bright Ideas; and opportunities to mentor new Fellows. To be eligible, applicants must be a newly admitted attorney (up to 5 years) or a law student, and be a member of the NYSBA and the Section.
- The Torts, Insurance and Compensation Law Section’s Executive Committee members participated in the New York County Lawyers Association (NYCLA) Young Lawyers’ Section “Mentor-for-a-day-Auction” held this past September 7th. Law students from several law schools bid (with fake money) on “an experience” with a judge or attorney of their choice for a day. Several TICL Executive Committee members formed “Team Mentor” and offered to spend the day with six law students. Team Mentor provides a fun, lively and interesting opportunity to have lunch and a group discussion on the importance of Bar Association membership as well as a range of law related topics. The winning law student members of Team Mentor were also invited to attend the TICL open Executive Committee meeting, CLE and Diversity Networking Reception this past November 17th.
- The Young Lawyers Section has an online mentor directory in place which is available to YLS members. The Section is currently piloting a mentor program with 1L students from the Cardozo School of Law; this initiative includes about 30 Manhattan-based attorneys from all backgrounds and fields of expertise. Attorneys need not be an alumnus of Cardozo to participate. The commitment is a minimum of three in-person events, one being a social event in fall 2011 that brought together all mentees/mentors for one-on-one meetings between attorneys and mentees. There will also be a social event held during the late spring prior to exams. Should a mentor and mentee develop mentoring relationship – a goal of this program – additional meetings and contacts are strongly encouraged, but not

required. The YLS goal is to expand this program state-wide. They are currently looking at Albany, Cornell and Syracuse Law Schools.

Action Steps: *Expand members-only mentoring programs (Memb, Sect, DSS, MIS, MKT)*

- 1. Recommend to the Executive Committee the appointment of a dedicated group to help foster a mentoring culture throughout the Association, and to develop a comprehensive and coordinated mentoring plan, including but not limited to: the development and sharing of best practices for section mentoring programs; guidance for section mentoring programs; mentoring of members on the use of the Association's resources, including technology; and the possible development of a senior corps of retired attorneys who are willing to devote time to helping younger attorneys.*
- 2. Develop an online Mentor-Interface available to all NYSBA members that will help to connect mentors with mentees, and will also provide training resources (both written and videos) for mentors and mentees.*
- 3. Offer mentorships that are available in various ways, including direct person-to-person and online connections.*
- 4. Develop a free, annual educational program (or other incentive) to attend an event plus social opportunity to encourage mentors and mentees to meet personally*
- 5. Ask Sections to sponsor a lecture series on career development, oriented towards their specific practice areas.*
- 6. Explore establishment of a "Radio Show" on various employment topics, allowing for interaction between the host and participants. Consider use of free resources such as "Blog Talk Radio Live Stream, You Stream.*
- 7. Explore the feasibility of an "Ask-a-Mentor" list serve; if implemented, promote and expand as appropriate.*
- 8. Host "Moot Courts" to train members on how to work on appellate cases; with use of webcasting for critiques.*

Expand members-only networking opportunities

Current Situation:

Numerous networking opportunities occur throughout the year and include the Annual Meeting, Section spring, summer or fall meetings, Section committee meetings, Section sponsored social events, and meetings of Standing Committees. However, member access to these opportunities on an individual level is very much dependent on which particular Sections or Committees a member belongs to, and the individual's geographic location. Many Section spring, summer or fall meetings are held at locations outside of New York State, and often at expensive resorts – requiring costly travel and accommodations as well as two to three days away from the office.

Additionally, a disproportionate number of Section or Committee meetings are held in New York City, placing upstate members at a disadvantage when it comes to in-person participation and networking. Finally, not all Sections or standing Committees conduct the same number of events annually, and some Sections or Committees provide far more networking opportunities than others.

Sections are able to achieve a number of important goals by hosting or participating in larger Association hosted networking events. Sections reinforce the value that they deliver to their members by providing them with an opportunity to interact with their colleagues in a relaxed, social setting. Such events are also excellent for recruiting because they afford non-members the chance to interact with current Section members and to hear first-hand the benefits to their practices of joining the Section. Sections need Association encouragement and support to host such networking and recruitment events on a regional basis.

Action Steps: *Expand members-only networking opportunities (Memb, Sect, DSS, MKT)*

1. *Institutionalize regional networking and recruitment receptions with Executive Committee regional Vice Presidents as hosts. Planning and oversight of quarterly events would be done by the Membership Services Department in coordination with the DSS liaisons who would assist in expanding Section participation and support. The Association can provide a “start-up” level of funding for regional networking and recruitment events, and can then establish a level of contribution for each Section to contribute. Such events must emphasize the importance of outreach to new attendees, to promote greater inclusiveness, diversity and interaction as well as the necessity of providing a welcoming environment. The goal is to reinforce the value received by current Association and Section members by providing networking opportunities that research has identified as being of importance to them, and to also create opportunities for new member recruitment for both the Association and the Sections.*
 2. *Encourage Sections and Committees to hold networking events upstate.*
- 2. Provide more members-only law practice management assistance, technology assistance, more Section-related substantive law updates and more user-friendly and relevant website resources, to improve the value of Association and Section membership to different segments of Association members.**

Assumptions & Rationale: We need to identify the products and services that our members want, using member satisfaction research and other means. Value is defined differently by different member constituencies. Research shows that most members place value on tangible, practical, practice-related support/assistance/information. Membership in Sections leads to greater longevity of Association membership. A recent analysis from the NYSBA database

indicated that Association members who were also members of Sections were members of the Association for a significantly longer time than those not in Sections (18.5 v. 11.5 years).

The Association's extensive research provides clear insights into members' and prospective members' thoughts on how value could be improved. Many attorneys want more practical benefits to help them on a daily basis. The most frequently cited examples of what members and prospective members want and need from Association membership include e-filing assistance; forms/practice area guides; frequent, concise practice updates; in-person and electronic help with employment issues and referrals; and CLE on relevant topics.

Provide more members-only law practice management and technology assistance

Current Situation:

The Law Practice Management Department is within the Continuing Legal Education Department and its main focus is on producing LPM-related CLE programs throughout the year in addition to producing LPM based publications. LPM CLE programs and publications are available to both members and non-members with non-members paying a premium.

Action Steps: Provide more members-only practice management assistance and education in the noted areas of e-filing; forms/practice area guides; frequent and concise practice updates; and CLE on relevant topics. Provide more members-only assistance and education in the use of evolving technologies. (LPM, MIS, DSS, Sect, LIT, CLEPub, Memb)

- 1. Create a "members only" LPM homepage providing exclusive access to LPM resources, including free access to select archived programs and practice-based forms.*
- 2. Initiate outreach to Sections and Committees to provide content for regular editions of T-News, GPS Tracker, and other practice-support resources for NYSBA members.*
- 3. Explore the possibility of producing a series of informational video presentations (with transcripts) on LPM related topics. For example, videos could present technology updates on such topics as LPM cloud computing or how to videos on e-filing.*
- 4. Continue to produce webcasts of CLE programs on LPM related topics such as the following programs scheduled for 2012:*

Malpractice Insurance – The Application Process

Data Security Training for Solos – Safe-Guarding Client Information

E-discovery – What You Need to Know

Alternative Fees

Growing Your Firm – Part One - Bringing on Lateral Partners - Partnership Agreements 101

Growing Your Firm – Part Two – “Of Counsel” Arrangements and Virtual Law Firms
Legal Project Management
Procurement and RFPs – What You Need to Know
Retirement - Selling Your Law Practice
The Business of Law and Bill Collection
Disaster Planning and Emergency Preparedness – Best Practices for Solos
Cloud Computing – The Basics
Best Practices for Solos 2012 – Panelists Share Their Insights

5. *Continue to work with the Lawyers in Transition Committee to produce free lunchtime webcasts addressing LPM topics of importance to members.*
6. *Work with the Publications Department Director to cross-market LPM focused publications and forms to members.*
7. *Explore the feasibility of contracting with an outside software support company as an affinity partner to provide NYSBA members with technical support at a discounted fee (ex. Micro-Knowledge, Geek Squad, etc.).*

Provide more Section-related substantive law updates and more user-friendly and relevant website resources

Current Situation:

For most Sections, the development and publication of Section-related substantive materials rests with their newsletter and journal editors, as well as their program chair. Other sources of content are the Section’s blogs and list serves and the reports prepared by their substantive committees. Primarily, substantive content is developed for and published in the Section’s newsletters or journals. However, over the past few years, Sections have become less likely to produce substantive comments or reports on existing law or pending legislation.

When substantive content is produced in a newsletter or journal, the Association posts it to a Section’s website. The Section publications are also indexed and are available as an archived resource for Section members. Section newsletters and journals are also available in a searchable format as part of our relationship with LoisLaw, a division of Wolters Kluwer. This version provides access to the text of citations.

Other sources of substantive content are course materials prepared for Section meetings and Section sponsored blogs and list serves. However, Sections may at times forget to alert staff

when new content is available for posting to the Section website. At this point the blogs, while at times an excellent source of substantive content, are not limited to Section members. Therefore they do not serve as an exclusive member benefit. It is anticipated that the new CMS will enable us to limit access to the blogs.

Action Steps: *Provide more Section-related substantive law updates (DSS, Sect, Memb, MKT, ExC, WEB)*

- 1. Invest more staff editorial resources in making broader use of valuable Section publications/newsletters and Section educational program content. Post materials to Section web-sites to enhance the value of Section membership. Post selected materials on areas where non-Section members have access, so they can be exposed to the benefits of Section membership.*
- 2. Increase awareness among members of the considerable content that is available on the Section websites.*
- 3. Encourage the development of substantive reports by the Sections and their substantive subcommittees by encouraging each new Section chair to begin their terms by identifying two projects for development into substantive reports for review by the HOD.*
- 4. Encourage staff Section liaisons and Executive Committee Section liaisons to work with Section leadership to plan for Section creation and publication of more substantive content and reports.*
- 5. Consider the use of social media as a distribution channel for substantive legal alerts and news.*

Action Steps: *Provide more user-friendly and relevant website resources (MIS, WEB, Sect, CLEPub, Memb)*

- 1. Use the new website Content Management System scheduled for 2013 to improve the layout and navigation of the Section websites. Provide more customized, personalized "Content-Round-Ups."*
- 2. Make use of the new Web CMS to allow members to customize their desired website content, and deliver it via RSS feed.*
- 3. Support expansion of Section-driven electronic updates, such as GP WeBrief.*
- 4. Increase the number of content editors within Sections who gather, organize and disseminate content to members, to achieve more timely distribution of new case developments, news round-ups, etc.*

5. *Establish a new online publication produced by the Publications Department that features "Best of NYSBA" articles drawn from the full range of Association content, and that is issued quarterly and delivered electronically to all NYSBA members.*
 6. *Continue to investigate more vendor-supplied substantive law informational resources, such as FastCase.*
 7. *Offer free "Best of NYSBA.org" web-conferences to provide greater support to members who wish to be introduced to the website resources, and enable them to make better use of the NYSBA website. Archive the web-conferences on the website to allow for future viewing by members.*
3. **Increase targeted marketing and expand communications regarding the tangible, practical benefits and dollar-value of membership, to members, prospective members and their respective law office management, to improve the real, delivered and perceived value of membership.**

Assumptions & Rationale: Member awareness of services and value must be improved. The Association must more effectively educate members and market its products and services to them.

NYSBA member satisfaction research reveals a widespread low level of awareness of Association services among members and, even more so, among non-members and former members. Recent focus group research indicates that the Association has trouble convincing members that the Association provides sufficient value for the money invested in dues. Members tend to think that the Association is an "okay" to "good" value, while non-members or former members see the Association as a "not so good" to "okay" value. Survey findings indicate an erosion of our perceived value between the 2005 and the 2010-11 member satisfaction research studies. The 2010-11 research also indicated that law office partners were becoming more concerned about the cost and value to the law firm of their associates' membership in bar associations, and were becoming less likely to financially support membership. Improved, targeted communications regarding the value to various constituencies could bolster membership recruitment and retention and dues income.

Current Situation:

The mainstay of the Association's communications to members about the benefits of membership consists of a series of direct mail pieces that are distributed in late spring and throughout the summer. These are targeted at specific segments of members that are considered to be at higher risk of non-renewal. Each piece focuses on a specific benefit area and their selection is based on member and lapsed-member responses to the Association's benchmark surveys. This effort

culminates in a brochure that summarizes the full range of member benefits and these are mailed to all members at the end of September. All members receive periodic emails generated by the Membership Department; these are used to provide members with updates on benefits, notice of new offers, or to feature a particular benefit in greater detail.

Members receive targeted emails based on their chosen areas of practice. These include information about new publications or specific continuing legal education programs. Members also receive email from Sections to which they belong, and these communications alert members to the full range of Section activities and events. The Association distributed more than 15 million email messages in 2011.

The Association makes use of its publications as additional means of reinforcing the value of membership. For example, a standard Section of the *State Bar News* is dedicated to presenting the full list of member benefits; print ads in both the *State Bar News* and *Bar Journal* call attention to specific products or services; and a pull-out desktop reference on updates to the website is inserted on an annual basis in the *State Bar News*.

The website has a complete list of member benefits and also provides “landing pages” where members may login and receive access to such benefits as free LoisLaw research or a free trial of CLIO law practice management tools. Specific areas of the website provide dedicated resource centers for solo and small firm practitioners, for government attorneys, for non-resident attorneys and for law practice management. The website contains many substantive reports and articles of interest to members; provides a user-friendly interface for searching for specific CLE programs or publication; and gives one access to Sections and standing committees to which they belong.

During the dues renewal season which runs from early October to the end of March, members receive mailed notices and email messages that reinforce the range of benefits provided by their participation in the Association. A telemarketing firm is engaged at the end of the renewal initiative to make phone contact with members who have not renewed.

Telemarketing is also employed in a non-member recruitment campaign in September in conjunction with direct mail to communicate the value and benefits of joining the Association.

Action Steps: *Increase targeted marketing and expand communications (MKT, Memb, WEB, ExD, MedSv, CLEPub, CLE, BarSv)*

- 1. Invest more staff resources into developing marketing communications materials that are focused on member's career/life stage to better recognize the support that the Association can provide at each stage of their career.*

2. *Recommend the use of PURLS – personalized URLs. These direct links to customized pages can be used in a variety of applications – from bringing a member directly to a pre-filled dues renewal form, to driving traffic to content that is specific to an area of practice, event or practice type. For example, a PURL could be www.maryjones.nysba.org and would bring Mary Jones directly to her personalized page with custom content based on her stated area of practice.*
 3. *Use the automated functionality of the new Content Management System to roll up related content topics to offer customized content to members.*
 4. *Hire a commission-based sales person(s) for targeted sales of NYSBA memberships and products, including publications and CLE, with safeguards and sensitivity when contacting members.*
 5. *Engage Media Services to communicate tangible member benefits and benefits-related news to specific groups.*
 6. *Engage a marketing/communications firm to help develop a comprehensive communications plan and consistent message platform for the Association and to assist with implementation.*
 7. *Establish bi-weekly or monthly meetings led by Publications staff with members in the CLE Program, Media Services and Member Services Departments to provide information on new program and publication offerings that will assist in the cross-marketing of CLE products and Association services.*
 8. *Create a standard member benefits message highlighting the benefits of membership, to be included in marketing pieces that are generated from each department.*
 9. *Develop a pilot test to see if newly admitted members who are automatically enrolled in the Young Lawyers Section are more likely to continue their membership. Use a randomly selected test group that is automatically enrolled in the Young Lawyers Section and a randomly selected control group that is not.*
 10. *Use the existing State Bar Service Center to make outbound calls to lapsed members to conduct exit interviews as to why they left the Association.*
4. **For new lawyers as an important constituent member group, develop targeted communications, expanded employment assistance, networking and mentoring programs and special initiatives that help them develop practical skills, to increase the value of membership to this group.**

Assumptions & Rationale: Each year, more than 50% of the members who drop their membership are newer attorneys, those admitted within the first two to three years of practice. Research relating to new attorneys that the Association conducted in the fall of 2010 reveals that many of these new attorneys struggle to find employment and desire more opportunities to meet more experienced attorneys and get mentoring support. Targeted communications and expanded employment assistance, combined with the practical benefits of

expanded networking opportunities throughout the state and mentoring programs, would demonstrate the tangible benefits of membership to this group, which represents the future of the Association.

Action Steps: For new lawyers as an important constituent member group, develop targeted communications (BarSv, MedSv, MKT, Memb)

1. Use the existing State Bar Service Center as time allows to make phone contact with all new members to discuss their expectations of membership and how NYSBA can help, and apprise them of the Association resources available to them. Encourage them to join a Section.
2. Include Media Services to help communicate tangible member benefits and benefits-related news to newly admitted members.
3. Invest more staff resources into developing marketing communications materials that are focused on newly admitted member's career/life stage to better recognize the support that the Association can provide at this early stage of their career.
4. Consider the use of short MP4 format video messages to highlight key benefits and tips on how to make the most of their NYSBA membership.

Action Steps: For new lawyers as an important constituent member group, expand our employment assistance (LIT, Memb, WEB)

1. Establish NYSBA Job Search support groups for newly admitted members; encourage independent member groups conducting bi-weekly "meet-ups" to share, for example, peer-coaching, weekly "home-work" assignments to help job-seekers on regional basis.
2. Explore contracting with independent "job coaches," perhaps on a retainer basis, to provide active job-hunting assistance, weekly tips, etc. specifically targeted to newly admitted members.
3. Explore the establishment of a "Job-Services Resource Guide," similar to the NYSBA Vendor Guide, to provide a listing of job service practitioners, such as recruiters and coaches specifically targeting services for newly admitted members.
4. Continue to encourage the LIT Committee to produce more employment-related conferences targeted to newly admitted attorneys.
 - a. Restrict live events to members only; recruit from non-member participants in webcasts.
 - b. Develop employment resources including resume templates, cover letters, etc. specifically targeted to newly-admitted attorneys.
 - c. Investigate the feasibility of LIT sponsored and vetted legal job coaches who specialize in assisting newly admitted attorneys.

- d. *Improve marketing of the LIT conferences; consider 10 minute pod casts of helpful tips from previous programs of particular interest to newly admitted attorneys.*
5. *Expand NYSBA's online employment resources specifically for newly admitted attorneys; include helpful how-to videos that provide practical advice on employment topics, and expand links on the NYSBA web site to the employment resources.*

Action Steps: *For new lawyers as an important constituent member group, develop networking and mentoring programs (Memb, Sect, DSS)*

1. *Develop a Mentor-Referral model specifically focused on newly admitted attorneys. Offer mentorships that are available in various ways, including direct person-to-person and online connections.*
2. *Establish regional "Meet-Up" style employment seeking support groups for newly-admitted members, to be self-sustaining volunteer groups. Offer suggestions for "ice breakers" to allow for greater interaction and a welcoming environment. Identify a "coach" for each regional group.*
3. *Ask Sections to sponsor a lecture series on career development for their newly admitted members, oriented towards their specific practice areas.*
4. *Explore establishment of a "Radio Show" focused on employment challenges of newly admitted members, allowing for interaction between the host and participants. Consider use of free resources such as "Blog Talk Radio Live Stream, You Stream."*
5. *Explore the feasibility of an "Ask-a-Mentor" list serve for newly admitted members; if implemented, promote and expand as appropriate.*

Action Steps: *For new lawyers as an important constituent member group, develop special initiatives that help them develop practical skills (Memb, CLEPub, LIT)*

1. *Enhance the current membership welcome packet to include and highlight existing CLE practical skills programs and publications for newly admitted members.*
 2. *Continue to provide discounted Practical Skills books in whole or in part targeted at an attorney's particular area of practice.*
 3. *Provide access to the Committee on Lawyers in Transition's monthly webcasts for informational purposes.*
- 5. Offer specific CLE or other substantive incentives to new and existing members in connection with recruitment of new members and annual membership renewals, to improve the real and perceived value of membership.**

Assumptions & Rationale: At the March 31, 2011 Strategic Planning session, the group observed that “The NYSBA value proposition is key to membership recruitment and retention. Survey findings indicate an erosion of our perceived value. There is strong identification of value with the Bar’s CLE programs.”

The 2010 Member Satisfaction Survey provided clear evidence that members and prospective members appreciate the Association’s CLE offerings. At present, less than one-third of our members participate in CLE programs. By providing an incentive to join or renew membership in the Association, such as a free, online MCLE program or free practice forms, with each membership enrollment or annual renewal, the real and delivered value of membership would be enhanced, and the decision to join or renew would be encouraged and directly rewarded. In addition, for those members who don’t currently take NYSBA CLE, this would be an excellent opportunity to expose such members (and potential CLE customers) to the high quality and ease of using of NYSBA’s educational offerings.

Current Situation:

A choice of a free, online Ethics CLE course or LPM program is used as an incentive during the fall for new-member campaigns. Additional offers have included free publications of forms on disc. Newly admitted non-members are offered a 30% discount off our 2 day, 16 credit, Bridging the Gap program registration fee as an incentive to join the Association. The first year membership for newly admitted attorneys is free of charge.

Action Steps: *Identify potential CLE incentives. Possible incentives could include: (Memb, CLE, CLEPub, LIT, MKT)*

1. *Enhance the current membership welcome packet to include and highlight existing CLE programs and publications, member incentives and benefits for both the experienced and newly admitted attorney.*
2. *Continue to provide discounted Practical Skills books in whole or in part targeted at an attorney’s particular area of practice.*
3. *Provide access to the Committee on Lawyers in Transition’s monthly webcasts. Topics such as “How to Start Your Own Law Practice” would be very beneficial for all attorneys during this economic climate.*
4. *Establish quarterly meetings between the CLE and Membership Departments to review enhanced program offerings and benefits.*
5. *Investigate potential incentives for membership renewal.*
6. *Coordinate campaigns with incentives to establish benchmarks to determine the effectiveness of the incentives in attracting new members. Did the incentive have an impact on the individual’s decision to join or renew?*

Performance Measurements:

1. Membership retention levels
2. New member recruitment results
3. Research findings gauging satisfaction with value
4. Section membership levels
5. Retention levels of new attorneys

- B. Objective: Strengthen the Association’s CLE programming and delivery and maintain the Association’s market leader position by providing quality, targeted and affordable CLE that is accessible through multiple delivery systems.**

Strategies:

- 1. Expand CLE delivery through greater use of technology.**

Assumptions & Rationale: Historically, there has been a strong identification of value with the Association’s CLE programs. However, the 2010-11 Member Satisfaction research revealed that survey participants were moderately favorable about NYSBA’s CLE, but some saw it only as “fair.” NYSBA CLE is known for highly qualified speakers, an excellent annual meeting and good program materials. Areas that survey participants cited as needing improvement included accessibility (e.g., it often is difficult for upstate attorneys to attend live programs because of their location) and use of technology (e.g., through use of webcasts, and programs accessible on iPods, iPads and MP3 players). In addition to the cost to register for CLE programs, travel expense was also cited as making NYSBA CLEs more expensive to attend than programs offered by other providers.

Free, 5–10 minute podcasts, developed from CLE programs, could be made available on Section websites to enhance the value of membership and further cross-market Section sponsored CLE programs. Annual meeting programs could be recorded and made available on the NYSBA website after the annual meeting, at a modest cost for members.

Programming

Current Situation:

At present, 75% of the annual topics presented by the CLE Department are developed in cooperation with Sections; the remaining 25% are developed by the CLE staff attorneys with input from the CLE Committee after determining the hot topics of the day. (Recent examples include Same Sex Marriage and Power of Attorney)

In an effort to revitalize the selection process, the CLE Committee membership has been reorganized to ensure adequate topic representation and to become more actively involved in topic selection and delivery. In an effort to create additional topics to strengthen CLE programming, the CLE Committee has committed to meeting with the Section chairs to work more closely in determining topics. The Committee and staff are also expanding to other nontraditional topic areas, such as financial issues.

Action Steps: (CLE, Sect, Memb, MKT)

1. *Continue the CLE Committee's involvement with topic selection to expand offerings and speaker pool.*
2. *Identify substantive topics not represented in current CLE program offerings.*
3. *Continue building strong working relationships with Section chairs to benefit from their expertise in their substantive areas.*
4. *Involve local bars and encourage them to co-sponsor a NYSBA CLE program scheduled in their geographic area as a benefit to their members. Costs and revenues go to the Association.*
5. *Continually review membership and other Association marketing materials to ensure that the diversity of CLE programming and the skill and prominence of program speakers are regularly highlighted.*
6. *Expand the Association's competitive advantage in CLE programs and publications by leveraging the substantive content of our CLE programs and publications with short-term, interactive forums. This may be accomplished in two ways. CLE program speakers would agree to participate in a temporary forum setup for their program, allowing participants to ask questions, discuss content and interact with other participants and the program speakers. Similarly, an author of a substantive article could agree to participate in a short-term forum where readers could discuss the article with other readers and the author. Both approaches leverage the investment in the substantive content and expand on the value received by members.*

Expand Delivery of Programs through Technology

Current Situation:

The CLE Department has expanded its use of webcast technology by adding a webcast option to appropriate live programs thus enabling a larger portion of Association members to view the program for credit. In addition, video conferencing technology has been added to Bridging the Gap programs and other program, creating an interactive live program link between New York City and Albany thus allowing newly admitted attorneys in the Albany area to attend these programs for credit.

Recorded programs are marketed online in video/audio online streaming, MP3 and MP4 download options and DVD/CD formats ensuring availability of programming to a wide segment of the membership. The DVD/CD product lines are being upgraded to include a data disc containing both course materials in PDF format and an MP3 audio file enabling downloading to iPads and iPhones and other hand held devices.

Action Steps: (CLE, Sect, MIS)

- 1. Continue to offer courses through multiple delivery vehicles. Currently, a webinar option is being added to a live course where appropriate, followed by a timely video replay of the program. The program then is archived and available for sale.*
 - 2. Expand the use of the video conferencing option to include additional CLE programs.*
 - 3. Continue to expand the use of webcast options for live programs*
 - 4. Investigate the possibility of providing Sections with an option to upload recorded programs to their Section websites for non-MCLE informational access by their members.*
 - 5. Continue to explore the segmentation of programs into shorter segments that can be downloaded to hand held devices.*
 - 6. Streamline and upgrade technology to improve registration and MCLE certificate distribution process at each program location. This may involve granting site coordinators access to iMIS and training them on its use.*
- 2. Increase the differential between the cost for members and non-members to attend Association or Section-sponsored CLE programs and to purchase publications and products.**

Assumptions & Rationale: The 2010-11 Member Satisfaction research results cited ways in which the Association could excel in its delivery of CLE. Members wanted the Association to offer greater member discounts, as it further demonstrated the dollar-value of membership. Integrating higher levels of member discounts on CLE programs and products would be a powerful way to deliver greater value to members.

Current Situation:

The CLE Committee recommended a differential between member and nonmember pricing of \$100 for approval by the Finance Committee which will be implemented with the Spring 2012 CLE Session.

Action Steps: (MIS, WEB, CLE, Memb, MKT)

1. *Explore options for an online process to enable non-members to join the Association in order to immediately access and enjoy member benefits and discounts.*
 2. *Conduct an ongoing evaluation of member/non-member pricing structure, particularly in relation to advanced-level Institutes, to further promote the financial advantages of NYSBA membership. Adjust the member/non-member registration fee differential based on the results of the evaluation.*
 3. *Highlight marketing copy to make members aware of the affordability of NYSBA CLE programs and publications.*
- 3. Offer a wider range of scheduling options for CLE programs and a greater range of niche topics and programs designed for more experienced attorneys.**

Assumptions & Rationale: The 2010-11 Member Satisfaction research report found that survey participants desired more opportunities for CLE outside the 9 to 5 workday. Evening and weekend programs, and more half-day programs, were cited as ways to encourage more attendance at CLE programs. Participants also expressed a desire for more specialized programming for more experienced attorneys.

Current Situation:

The CLE Department analyzes on an ongoing basis the most attractive and requested specialized areas on which to focus its resources. Programs produced by the Department are broken down by practice area and targeted to members according to their current level of expertise. For example, the Practical Skills programs are tailored for the newly admitted attorney in specific areas of practice, while specialized, 2-day CLE Institutes are targeted to experienced attorneys.

The Department continues to investigate the possibility of offering programs on Saturday, while testing the viability of scheduling evening “after work” programs. A recent course, offering a CPLR update, was held on a Saturday and was successful.

Action Steps: (CLE)

1. *Offer more half-day programs.*
2. *Continue to schedule and explore the success of Saturday courses.*
3. *Offer 3-hour evening programming especially in New York City to begin in Fall 2012 to attract the after work audience.*
4. *Expand niche programming by practice area using webcast technology to reach a targeted audience.*

5. *Continue to explore the use of webcast and video-conferencing technology to further expand the accessibility of programming for members.*

Performance Measurements:

1. CLE attendance and revenue
2. CLE hours consumed by members
3. Association and Section membership retention

C. Objective: Strengthen the Association's Sections to add benefit to the members.

Strategies:

1. **Ensure there is appropriate dedicated staff support to Sections by the continued development of the Department of Section Services staffed by employees exclusively supporting Sections and their committees.**

Assumptions and Rationale: Members are retained for longer periods of membership if they are involved in Sections. The Association should provide appropriate levels of staff support in order to assist the Sections. The staff support should consist of staff dedicated to the work of Sections and their committees to increase Sections' efficiency and provide more consistent support to the Sections. The staff support should have sufficient substantive and technological knowledge to meet the staff needs of the Section.

Current Situation:

The Department of Section Services is staffed with five dedicated liaisons and is supported by one full-time administrative assistant. There is a need for additional administrative support for DSS and this has been temporarily addressed by assigning other administrative support to assist DSS when their schedules allow.

Action Steps: *Ensure there is appropriate dedicated staff support (ExD, DSS, Sect, Mtgs)*

1. *Secure additional dedicated administrative support and assess overall staffing of the department during 2012 to ensure staffing levels are adequate to support Section needs.*
2. *Continue cross-training of DSS staff to assure the sufficient substantive and technological knowledge of staff to meet the needs of the Sections.*
3. *Examine Section CLE program requests, including requests by Section committees, assess staff support and develop appropriate guidelines.*

2. Integrate the CLE provided by the Sections at all meetings with the CLE provided by the CLE department.

Assumptions and Rationale: There are two licensed providers of CLE within the Association: The CLE Department and the Meetings Department. Currently, Sections develop CLE at their free-standing meetings and the Annual Meeting without coordination with other Sections or with the CLE Department. Additionally, some Sections provide extensive CLE programs for the CLE Department, and some Sections provide no such programming. The CLE providers should be merged or coordinated by one overarching CLE committee of staff and volunteers in order to assure that all current topics are covered and to minimize overlap. Financial arrangements for sharing of CLE revenues should be reexamined.

Current Situation:

A Special Committee on CLE under the Executive Committee has been created to explore the issue of improving coordination of the CLE Department and Sections and Committees in offering programs. Included in this discussion is the issue of profit-sharing. Current guidelines permit the Sections to produce CLE programs in the following manner: 1) co-sponsor a program with the CLE Department; 2) provide a CLE program at the Section's Spring and Fall meetings and at the Annual Meeting, in conjunction with the Meetings Department; and 3) provide a brief CLE program (1-2 hrs.) at Section meetings, with accreditation through the Meetings Department. Section generated CLE programs have traditionally been accredited for live presentation only by the Meetings Department and not recorded.

Recently, the CLE Department organized two pilot projects to record Section CLE programs and explore the possibility of instituting a profit-sharing arrangement. The 2011 Trusts & Estates Spring meeting and Criminal Justice Spring meeting were recorded and marketed on the NYSBA website with any net profits to be shared between the Sections and the Association. To date, a profit has not been realized. More aggressive marketing is planned for these programs.

Recently, the Meetings Department was granted accredited provider status by the New York CLE Board for webinar/webcasting formats. This will provide Sections with alternative ways to produce and distribute their stand-alone CLE programs.

Action Steps: (ExC, CLE, Sect, MKT)

- 1. Continue to work with the Executive Committee's Special Committee on CLE to establish guidelines for Section CLE programming. Establish action steps to implement the findings of the Committee.*
- 2. Coordinate CLE and Section-based CLE programming to avoid conflicts and duplication of efforts.*

3. *Continue to explore the implementation of a profit-sharing program that will provide Sections with a share of net revenue derived from Section stand-alone CLE program recordings.*
4. *Survey what other Associations are doing regarding integration of programming to determine whether other models would work for NYSBA.*
5. *Institute a Section member special registration fee for online and live CLE programming.*

3. Improve technology-based delivery of Section materials to members.

Assumptions and Rationale: Members want timely, tangible, practical, practice- related support and information. In most cases, Sections are the best vehicle for the Association to deliver this support and information. The Association should support enhanced technologies, including websites, list serves, and other electronic formats, to deliver Section information on a timely and convenient basis.

Current Situation:

One of the biggest challenges to implementing this strategy is achieving consistent use of existing resources. All Sections have a dedicated website within the Association's site, but not all Sections make the best use of this resource. While DSS staff liaisons can provide assistance to Sections in terms of encouraging their production of substantive content, the liaisons are not able to produce the content – this must come from the work of the Sections. As was noted earlier, Section subcommittees are not developing and publishing as many substantive reports as they once did.

The Association has the resources to provide Sections with access to such social media platforms as LinkedIn and Twitter, and can assist with setting up blogs and list serves. Staff can also arrange for the electronic distribution of Section publications.

Action Steps: *Improve technology-based delivery of Section materials [substantive content] to members (Sect, DSS, ExC, WEB, MKT, MIS, CLEPub)*

1. *Institutionalize the development of substantive reports by the Sections and their substantive subcommittees by establishing a formal schedule for the publication of substantive law updates and reports for HOD review.*
2. *Continue cross-training of DSS staff to assure the sufficient substantive and technological knowledge of staff to meet the needs of the Sections.*
3. *Use the new website Content Management System to deliver custom content based on Section membership.*

4. *Work with staff Section liaisons to encourage Sections to designate a Section Information Officer (SIO) to identify relevant content.*
5. *Ask staff liaisons or other Section support staff to assist SIOs with access to and the efficient use of Association website resources.*
6. *Use surveys of Section members to identify new and relevant technology delivery options; work with MIS for evaluation of practical implementation.*
7. *Develop the technical capability to allow members to select/manage their communications from the Association.*
8. *Adopt a flexible publishing system with the capability of handling text so as to facilitate publishing of content in print or electronic formats.*
9. *Convert substantive content that is currently non-searchable to a searchable format.*

Performance Measurements:

1. Section and Association member retention
2. Increased attendance at Section programs
3. Increased Section membership

II. TECHNOLOGY

- A. **Objective:** Use technology to communicate more effectively with existing members, attract and retain new members, and increase the overall value of membership in the Association.

Strategies:

1. **Implement technologies consistently throughout the Sections and Committees, as well as Association departments**

Assumptions & Rationale: There are inconsistencies in use of technologies within the Bar Center and across NYSBA Sections and Committees. There are inconsistencies in the level of technological adoption within Sections and Committees, with respect to the content on their web pages, use of list serves, online directories, blogs and other technologies. Increased use and understanding of technology places additional responsibilities on staff, without necessarily removing existing responsibilities, so staffing needs may need to be addressed within the NYSBA organizational structure.

Current Situation:

The Association recently underwent a staff restructure and a Section Services Division was created. The creation of the division should assist in eliminating the inconsistencies in the technology support offered to each Section.

In addition, there are many available options for each Section and Committee, including Webpage, list serve, Directory, Twitter, LawWatch, Blog, Facebook and LinkedIn. The issue within the Association is that many Sections choose not to be involved with everything that has been listed. The responsibility for the upkeep of the various options lies with each Section and Committee. For example, the content of a particular webpage, which is the key to a successful page, is the responsibility of the Section members, not staff. Staff can upload information, but cannot write the material. Similarly, if a list serve is developed, the Section and/or Committee need to select a member who can serve as a moderator. The Association policy states that it will not police the list serve, but reserves the right to take down the list serve if it is determined that the content on the list serve is inappropriate.

The Association is also in the process of reviewing proposals submitted for a new Content Management System (CMS). The new system will update the Association's process for managing content and will provide significantly greater functionality. It is expected that with the new system, the Association will be better equipped to respond to the numerous requests currently being received.

Action Steps: (MIS, ExD, WEB, DSS, ExC)

1. *Choose a CMS provider in consultation with leadership.*
2. *Prioritize service(s) that will become available to Sections/Committees and departments.*
3. *Inform the Executive Committee and the Section and Committee chairs of the systems options and capabilities.*
4. *Train staff in understanding the technology resources available so they can become proficient in providing administrative support for these resources to Sections/Committees.*
5. *Keep the Sections/Committees informed of new capabilities as they are added.*
6. *Determine what CMS functionality should be made available to Sections and Committees.*
7. *Determine whether any benchmarks should be instituted to decide whether the service should be continued.*
8. *Remind Sections and Committees that content must be managed by the Section/Committee.*
9. *Draft guidelines for Sections and Committees which set forth the staff support that will be provided in relation to list serves, websites, etc.*

2. Develop current forms of electronic information delivery to bring the Association to members' mobile devices.

Assumptions & Rationale: Membership use of technology is increasing, and our members expect NYSBA to use technology to deliver services and information. Mobile technology is increasingly important and having NYSBA apps resident on members' mobile devices increases visibility and relevancy of and connection with the Association.

Current Situation:

As noted above, the ability for members to download CLE courses and to access the Association's website onto their devices is now available. In addition, the Association has developed a Mobile App for Ethics, which is now available. MIS is also working on two additional Apps – a CLE Tracker and a mobile membership online directory, which will also be available in 2012.

The MIS staff is also reviewing the possibility of utilizing adaptive web technologies for increased mobile functionality; adaptive web technology can recognize the user's device and deliver the content optimized for that device.

More publications are also being offered electronically and are being migrated to the MagnetMail blast email platform so they can be distributed electronically.

Action Steps: (MIS, WEB, MKT, CLE)

- 1. Complete mobile Apps currently in development.*
- 2. Survey members to determine selection of additional Apps to offer.*
- 3. Continue to survey members to determine the preferred method of receiving information from the Association.*
- 4. Educate members and staff to adopt the mindset of developing products that can be immediately posted and accessed online (platform neutral publishing), with the secondary focus on how a product may be published.*
- 5. Review the possibility of a mobile website that streamlines the available information.*
- 6. Develop CLE programs and publications in segments for immediate posting on the website.*

Performance Measurements:

1. Develop first mobile app and infrastructure for new apps (completed)
2. Develop additional mobile apps
3. Measure use of mobile apps by members by monitoring downloads and usage.

B. Objective: Increase organizational support for use of technology

Strategies:

1. Ensure adequate funding for technology initiatives, including consideration of new and creative funding options.

Assumptions & Rationale: The NYSBA has been operating within an environment of cost containment over the past several years, which does not always lend itself to implementing new technologies and innovative member services. Increased use of technology will require increased resources in terms of project funding and technical staffing. Options include investing reserves to support technology, increases in staff, and reallocating resources from existing programs.

Current Situation:

For the past few years, the Association has been focused on saving money and cutting expenses. Although the Finance Committee has always been supportive when requests have been made for additional funds to support this area, the Association leadership has now placed greater emphasis on updating technology. In response, the Finance Committee approved a budget adjustment in 2011 to update the Association's video capabilities for meetings and video conferencing. For 2012, the Finance Committee approved the funds to move forward with a new website Content Management System and phone system.

Action Steps: (MIS, FIN)

- 1. Provide the Finance Committee with a five year plan to advance the Association's technological capabilities.*
 - 2. Increase the threshold for requiring three bids for any expenditure from \$3,000 to \$10,000 for quicker turnaround.*
 - 3. Evaluate the process by which technology related requests are approved.*
 - 4. Review funding options.*
- 2. Increase Executive Committee Leadership involvement in the strategic technology vision and plan for the Association.**

Assumptions & Rationale: NYSBA will have to make strategic decisions on which technology applications to utilize, support and fund at the highest level. Executive Committee involvement and understanding in these decisions will have to increase. NYSBA decision-making processes have to keep pace with the pace of technological advances, which will affect the budgeting process and spending decisions.

Current Situation:

The Secretary of the Association is the *de facto* liaison for all technological issues. Intermittent reports are also presented to the Executive Committee.

Action Steps: (MIS, ExC)

1. *A report on technology should become a standard report for each Executive Committee meeting.*
2. *Assign Executive Committee members to become more directly involved in the Association's technology issues by service on the Electronic Communications Committee.*
3. *Determine whether a committee (Technology Council consisting of high level staff and leaders), well versed in issues faced by nonprofits, should be assigned to review and recommend projects.*

Performance Measurements:

1. There should be regular technology updates and reports to the Executive Committee, and direction and feedback from the Executive Committee.
2. Formation of Technology Council, similar to Finance Committee, to help set technology strategy.

3. Include a Technology Director on the NYSBA senior management team.

Assumptions & Rationale: The importance of technology to the other areas of the Strategic Plan – Membership, Programming and Finance – requires that the head technologist at the NYSBA be represented in a peer level position on the Senior Management Team.

Current Situation:

The Director of MIS oversees this aspect of our operations but is not included in Senior Director level meetings.

Action Steps: (MIS, ExD)

1. *Review the staff structure and operational needs of the MIS department and designate a Chief Technology Officer who will serve in a peer level position on the senior management team and participate in meetings of the senior management team to discuss technology needs for current and future projects.*

Performance Measurements:

1. A Technology Director at a high level within the Association may be necessary to monitor, evaluate, guide decision making and oversee implementation of new technologies.
2. Create additional staff level position(s) as necessary to support anticipated technical growth areas, such as mobile application/web development

4. Foster an environment that encourages innovation.

Assumptions & Rationale: An organizational objective to maximize the use of technology works best in an environment that encourages creative innovation and is tolerant of expected and eventual failures. Status quo, traditional policies and procedures, and fear of failure severely inhibit the creative process of innovation. The entire Association staff should be encouraged to reevaluate existing products, services, and procedures in terms of their current relevance to members and efficiency of delivery systems. The Association should encourage use of technology by Sections, Committees and in the delivery of Association services. There should be consideration of an award for use of technology to highlight and encourage innovation in the Association.

Current Situation: With the financial backing of the leadership, the Association is moving forward with a new web Content Management System, mobile Apps and additional methods of providing CLE to its members.

Action Steps: (MIS, WEB, MKT, ExD)

1. *Implement the new CMS beginning in 2012.*
2. *Continue meetings with each department to develop ideas and determine needs.*
3. *Continue to seek information from members to determine the preferred method to receive information.*
4. *Continue to train staff to focus on developing contents that can be immediately posted on the Internet.*
5. *Remind staff to be innovative and attempt new ideas. Staff should be mindful that there may be failures, but staff should continue to be innovative.*

* Working Group

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**Key to responsible departments and entities:

BarSv	State Bar Service Center (Call Center)	LPM	Law Practice Management
CLE	CLE Committee and Department	MedSv	Media Services
CLEPub	Publications	Memb	Membership
DSS	Section Services	MIS	Management Information Services
ECC	Electronic Communications Committee	MKT	Marketing
ExC	Executive Committee	Mtgs	Meetings
ExD	Executive Director	Sect	Sections
FIN	Finance Committee	WEB	Web and Internet Services
LIT	Lawyers in Transition Committee		

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