

WCBA/TENTH STRATEGIC PLAN MATRIX

Vision Statement: **Over the next three years Wake County Bar Association/Tenth Judicial District will:**

- **Promote and enhance professional values, relationships, and service to the public and the profession;**
- **Emphasize and communicate the importance of the rule of law and the role of attorneys and judges in the administration of justice and in society; and**
- **Increase membership in WCBA and overall participation in the activities of both organizations.**

DRAFT

Presented to the WCBA/Tenth JD Bar Board of Directors – October 8, 2015

**GOAL 1: HELP ATTORNEYS ACHIEVE A HEALTHY BALANCE
IN THEIR PERSONAL, PROFESSIONAL AND FINANCIAL LIVES.**

OBJECTIVES	TARGET MEASURES	ACTION STEPS (WITH DEADLINES)	ACCOUNTABILITY	COST/BUDGET/RESOURCES IMPACT
<p>Increase Members' Perception of the Value of the WCBA Membership by Making CLE More Accessible to More Members.</p>	<p>Measure the success of these efforts by comparing number of members attending, accessing and using CLE to prior years.</p>	<ol style="list-style-type: none"> 1. Identify the different ways in which CLE is currently made available to members. Also, explore the current offerings around financial planning and consider adding a financial planning CLE.(Fall 2016) 2. Explore ways in which to make CLE available to more members, considering factors such as location, format and time in which CLE is currently offered. Consider how technology can improve the delivery of CLE, 	<p>CLE Committee</p> <p>Communications and Technology Committee</p>	<p>The most likely financial impact would be for upgrades to the WCBA/Tenth website.</p>

		<p>e.g., whether CLE can be made available in electronic or video format and be streamed live over the website or the Internet. (Spring 2017)</p> <p>3. Explore the possibility of archiving CLE content on the WCBA website, organized by topic area, for members' reference and use. (Fall 2017)</p> <p>4. Explore how the WCBA is currently advertising CLE opportunities and determine whether there are ways to improve advertising. (Spring 2017)</p>		
Increase Opportunities for Members to Network and Form Relationships	Measure the success of these efforts by comparing number of members	1. Analyze the current WCBA calendar and determine whether a more user friendly option can	<p>Communications and Technology Committee</p> <p>Membership Services Committee, Social Committee and Athletics</p>	The most likely financial impact would be for upgrades to the WCBA/Tenth website.

<p>through Greater Participation in Social Activities.</p>	<p>attending and participating in social events to prior years.</p>	<p>be implemented, e.g., a month-at-a-glance type calendar where a member can see all events taking place within the month.(Evaluation – Spring 2016; New proposal completed and implemented 2017)</p> <p>2. Ensure that social and networking events are being adequately advertised in all WCBA/Tenth communications, including a link to the master calendar in the digital edition of the Bar Flyer and email communications to members. (Spring 2016)</p> <p>3. Identify ways in which to create a stronger culture of inclusion and participation, e.g., by encouraging</p>	<p>Committee</p> <p>Membership Services Committee, Social Committee, Lawyers Support Committee (to identify non-alcohol events), Leadership Development Committee (encouraging diversity in leadership) and Athletics Committee</p>	
---	---	---	---	--

		<p>members to invite one new member to an event, by creating a more comfortable atmosphere at Bar luncheons and other functions for members and by identifying ways in which to identify new members so that existing bar members can identify and welcome them. (Fall 2016)</p> <p>4. Develop strategies to create a more welcoming culture across all WCBA/Tenth events that supports members (old and new), helps them to feel comfortable attending events and encourages members to participate more actively in the Bar. (Fall 2016)</p>		
--	--	--	--	--

<p>Increase Members' Perception of the Value of the WCBA Membership by Helping Members Network and Refer Business to Each Other More Easily.</p>	<p>Identify a way in which members can report successful connections that they have made through the WCBA/Tenth Membership.</p>	<ol style="list-style-type: none"> 1. Analyze the existing WCBA website membership directory tool and implement improvements to the same that would allow members to provide more information about practice areas in an intuitive, searchable format. (Fall 2016) 2. Explore whether there are ways to recognize members for referring business to each other as a means of promoting referral business and increasing members' perception of the value of membership, e.g., by recognizing members at luncheons, in the Bar Flyer or by creating a special 	<ol style="list-style-type: none"> 1. Communications and Technology Committee 2. Membership Services Committee and Professionalism 	<p>A new membership search tool would require upgrades to the WCBA/Tenth website.</p>
---	---	--	--	---

		annual award.(Spring 2016)		
Promote Greater Work/Life Balance and Satisfaction with the Practice of Law by Educating Members about Ways in which to Integrate Modern Legal Practice into their Daily Lives	Identify a way, e.g., a membership survey, in which members can report satisfaction with the practice of law.	<ol style="list-style-type: none"> 1. Evaluate the various ways in which the WCBA/Tenth is currently addressing worklife balance issues, e.g., through CLE offerings, print publications and luncheon speakers and identify ways in which those offerings can be strengthened. (evaluation completed fall 2016; proposals begin to be implemented fall spring 2017). 2. Consider strengthening and increasing the level of communication with members about work/life balance issues, e.g., 	<ol style="list-style-type: none"> 1. CLE Committee, Membership Services Committee and Communications and Technology 2. Communications and Technology Committee and President Elect 3. Membership Services Committee and 	

		<p>by dedicating issues of the Bar Flyer to different subject matter areas related to satisfaction with the practice of law, by inviting luncheon speakers to share ways in which the speakers' firms are integrating flexible practice methods, etc. (evaluation completed fall 2016; proposals begin to be implemented fall spring 2017).</p> <p>3. Evaluate the different ways in which technology is transforming the practice of law and share methods with the membership that promote flexibility and improve satisfaction with law practice. (evaluation completed fall 2016; proposals</p>	<p>Communications and Technology Committee</p> <p>4. Professionalism Committee.</p> <p>5. President-elect (2016 and continuing).</p> <p>6. CLE Committee and Lawyer Support Committee</p> <p>7. Staff and WCBA Board of Directors</p>	
--	--	---	---	--

		<p>begin to be implemented spring 2017).</p> <p>4. Consider ways in which to more effectively utilize Erik Mazzone and his team from the NC Bar Association Center for Practice Management to write and speak on legal technology and practice management issues. (2016)</p> <p>5. Consider a luncheon speaker series devoted to work life balance issues. (2016 and continuing).</p> <p>6. Evaluate CLE offerings and determine whether additional, cutting edge CLE programs can be added to address work/life balance issues, e.g.,</p>	
--	--	--	--

		<p>mindfulness based stress reduction courses in lieu of traditional substance abuse instruction. (2016 and ongoing)</p> <p>7. Develop a survey to track lawyer satisfaction to provide a base line for success of WCBA/Tenth programs in this area. (sent to all members Fall 2016)</p>		
<p>Provide Members with Opportunities to Live More Healthy Active Lifestyles</p>	<p>Track the number of members attending events.</p>	<p>1. Establish recreational groups, e.g., hiking, walking, biking, adventure sports, that do physical activity together on a regular basis, using existing technology like Meet Up. Consider creating groups of people with the same age, familial status, athletic</p>	<p>1. Athletics and Membership Services.</p>	

		<p>ability and interest level, e.g., groups of young lawyers, groups of older lawyers, groups of lawyers with young children, group of extreme athletes, etc. Also consider making “entry-level” opportunities available for people who are not currently active, e.g., stretching, basic nutrition education, etc. (Spring 2016 and ongoing)</p> <p>2. Develop recreational events aimed at young families with children. (Spring 2016 and ongoing).</p> <p>3. Consider devoting an issue of the Bar Flyer to athletic and recreational</p>	<p>2. Athletics and Membership Services</p> <p>3. Communications and Technology Committee</p> <p>4. Athletics. Staff and Membership Services.</p>	
--	--	--	---	--

		<p>opportunities with the Bar. Write articles about how lawyers combine healthy lifestyles and work, e.g., highlight Wake County Clerk of Court Jennifer Knox and her crossfit training and two small children. (2016 and ongoing).</p> <p>4. Identify various “team” activities that the WCBA/Tenth can do together, e.g., participate in the Komen Race and other team events in Wake County. (2016 and ongoing)</p>		
--	--	--	--	--

GOAL 2: PROMOTE PROFESSIONALISM

OBJECTIVES	TARGET MEASURES	ACTION STEPS (WITH DEADLINES)	ACCOUNTABILITY	COST/BUDGET/RESOURCES IMPACT
<p>Continue to Examine and Evaluate Existing Professionalism Programs and Activities for Continuation and Improvement, including but not limited to Professionalism Committee Programs and Publications: WCBA Lunch Roundtable Program on Professionalism and Ethics (including CLE credit); Bar Flyer, Newsletter, Blog Publications and</p>	<p>Seek to Increase Levels of Participation</p> <ul style="list-style-type: none"> - By Members in Events - By Professionalism Committee Members in Meetings and Volunteering <p>Seek to Increase Readership</p>	<ol style="list-style-type: none"> 1. Survey WCBA and Tenth Membership on Programs and Publications (1st Qtr 2016) 2. Hold a limited series of focus groups to explore and examine members' attitudes toward current levels of professionalism and efficacy of programs or how it may be improved through programs. (2016) 3. Review results re Fall Roundtable and compare participation numbers to others (annually) 4. Continue Current Annual Planning and Development for Spring and Fall Professionalism Programs and CLE 5. Continue current publications development (articles and blogs) and schedules for publication, 	<ol style="list-style-type: none"> 1. Professionalism Committee and WCBA Staff 2. Professionalism Committee 3. CLE Committee (annually) 4. Professionalism Committee, WCBA Staff and Comm/Tech Committee 5. Professionalism Committee 	<ol style="list-style-type: none"> 1. Some additional survey resources and time 2. None – same as now 3. None – same as now 4. None – same as now 5. Undetermined

<p>Contributions; Mentorship and Collaboration with Campbell Law School in Connections Mentoring Program; Spotlights Award, as well as Examining and Continuing to Seek to Improve and Support Other Programs and Efforts Reflecting on Professionalism and the Image of Lawyers in the Community, e.g. the PSI Program in Cooperation with the Chief Justice's Committee On Professionalism; Lunch With A Lawyer; Public Service Campaigns</p>	<p>Gambrell Award Effort</p>	<p>including new newsletter format</p> <ol style="list-style-type: none"> 6. Lobby however possible for further support/ consideration/selection of 2015 submission in 2016 in cooperation with Campbell Law (1st 6 months 2016) 7. Reevaluate/Resubmit/Rene w when possible (4th Qtr 2016/1st Qtr 2017) 	<ol style="list-style-type: none"> 6. ABA Delegates and Campbell Law 7. Professionalism Committee and Campbell Law 	
---	------------------------------	---	--	--

<p>Creed's 30 year anniversary</p>	<p>Media Interest and Coverage</p> <p>Levels of Member Agreements to Participate</p>	<ol style="list-style-type: none"> 4. Secure Commitments including holding "coffee house" style historical/informational/aspirational" meetings with some bar luminaries and New Members Presentation (beginning mid-2016 and ongoing annually) 5. In conjunction with above and Major Action Item in Objectives Column, create a Public campaign, including press release, Media package, public information, recruit participation, etc. (2nd Qtr 2016 and 1st Qtr 2017) 6. Hold a 30th Anniversary Public Ceremony with live Media Coverage - Perhaps as part of another Public Service Project or Event (2017 TBD) 	<p>and Comm/Tech Committee</p> <ol style="list-style-type: none"> 5. Professionalism Committee, WCBA Staff, and Comm/Tech Committee, Public Service Committee 6. Professionalism Committee, WCBA Staff, and Comm/Tech Committee, Public Service Committee 	<ol style="list-style-type: none"> 5. Media Package and Production Costs 6. Undetermined - Depends on Event selected and possible sponsorships
------------------------------------	--	--	---	--

<p>3) Professionalism Resources Vault/Collection and Liaison Project intended for the purpose of</p> <ul style="list-style-type: none"> -Educating our own -Managing and disseminating valuable information without the cost of re-inventing the wheel -Increasing our visibility and collaboration with other Professionalism 	<p>Quality and Number of Available Materials and Resources</p>	<ol style="list-style-type: none"> 1. Establish Resources Liaison Volunteer Coordinator position or new small sub-Committee from within the Professionalism Committee to oversee and work with the WCBA Staff to help develop a Professionalism Resources Liaison Staff Member and assign duties and responsibilities regarding the collection, storage and means for replay and other dissemination of materials (by year end 2017) 2. Reach out to other organizations and begin establishing collection and 	<ol style="list-style-type: none"> 1. Professionalism Committee and WCBA Staff 	<ol style="list-style-type: none"> 1. Cannot recommend without also accomplishing additional paid staffing at WCBA and Tenth

Committees, Groups and Organizations		process of making available to membership (By year end 2018)		
--	--	--	--	--

GOAL 3: IMPROVE MEMBERS, NON-MEMBER ATTORNEYS, AND THE GENERAL PUBLIC’S AWARENESS OF THE WORK OF THE WCBA/TENTH

OBJECTIVES	TARGET MEASURES	ACTION STEPS (WITH DEADLINES)	ACCOUNTABILITY	COST/BUDGET/RESOURCES IMPACT
<p>Determine whether the WCBA should abandon or re-imagine the “traditional” Bar Flyer in order to provide materials to members in a more accessible format and to allow members more choices in shaping content and topics.</p> <p>Identify ways to expand readership and relevancy</p>	<p>Content is re-shaped so that 50% of members are likely to have read at least one item</p>	<ol style="list-style-type: none"> 1. Survey membership on utility of current Bar Flyer and to test new concepts (2016) 2. Form ad hoc Committee for website development (2016) (pairs with 2nd objective) 3. Assess potential future staffing/resource needs and develop job description for consultant or staff, if needed. (2017) <p>Based upon results of survey and research by Committee, implement revised or re-imagined</p>	<p>Communications Committee</p> <p>Board of Directors (#3)</p>	<p>Cost of ad hoc committee Cost of survey Cost of assessment Potential cost for staff or consulting position to support new publication</p>

		<p>membership communication publication(s):</p> <ul style="list-style-type: none"> a. Creation of new or revised publication in process; Staffing needs assessment complete (2017) b. New or revised publication distributed (2018) 		
<p>Explore means by which the WCBA can increase the use/utility of its website</p>	<p>Website will be re-designed, re-imagined and fully updated.</p> <p>Measurable increased hits on website and stickiness (time spent per visit). Measurable data on opening of electronic messages.</p>	<ul style="list-style-type: none"> 1. Identify members for and populate Ad Hoc Committee for Website Development. (2016) 2. Task committee with assessing the current website and beginning the mapping of a new website (2016-17) 3. Begin implementation of new website 	<ul style="list-style-type: none"> 1. Ad Hoc Committee (tech savvy younger lawyers) 2. Board of Directors Communications/ Technology Committee 	<ul style="list-style-type: none"> 1. Anticipate increased hardware/software expenses of \$5K per year. 2. Assess need for consultant or staffing for development and/or implementation

		design (2017-18)		
Examine ways to develop quickly readable, informative frequent communications with membership. (Easy one click link to details of events, attendance, signup, and actual content of referenced articles/items	Number of communications sent and “opened” increased from 2015 levels.	<ol style="list-style-type: none"> 1. Assess current means of communication with membership. (2016) 2. Develop strategies for quick (Blog type?) communications (2016) 3. Evaluate options available in current electronic forums. (2016) 4. Expand forms of media vehicles utilized. (2017) <p>Implement strategies and establish means of assessing effectiveness. (2017-18)</p> <p>Report assessment results to Board of Directors (2018)</p>	Ad Hoc Tech Committee	<p>Cost of assessment if necessary</p> <p>Potential costs for consultant or staffing.</p>

<p>Explore methods to become a “Go To” source for much more information relevant to members.</p>	<p>Increased use of calendar by members (track hits). Increased number of postings for jobs, space, sale items, etc. by members (count postings). Expanded didactic content – such as advice, videos (taped sessions with wise attorneys, good programs, etc.), and catalogued articles (tracked by number posted).</p>	<ol style="list-style-type: none"> 1. Form ad hoc Committee to examine ideas for expanded content (2016) 2. Brainstorm on framework for accommodating expanded information tools (2016) 3. Metrics generated and used for measuring access requests to information (2016-17) 4. Assess potential future staffing/resource needs and develop job description for consultant or staff, if needed. (2017) 5. Launch new information sharing model (2017) 	<p>Ad Hoc Committee</p>	<p>See above on hiring.</p>
<p>Set up with guidelines for publication and for advertising content.</p>	<p>Not dilute our message</p>	<p>Form a one-time ad hoc committee (2017)</p>	<p>President/President-elect</p>	<p>No cost anticipated</p>

<p>Explore ways to increase commerce/referrals between members.</p> <p>Identify ways to share good ideas, best practices with other local Bars.</p>	<p>Member reports on numbers of referrals made and inquiries responded to for specific expertise (survey results).</p> <p>Track number of “touches” with other local Bars to share information.</p>	<ol style="list-style-type: none"> 1. Include ease and frequency of referrals in membership survey. Strive to increase frequency through survey results. (2017) 2. Track anecdotal and published reports of other Bars’ imitation of what we do that is successful.(2017-18) 	<p>Communications committee</p>	<p>See above re new staff position.</p>
<p>Explore the possibility of raising funds from advertising on the website</p>	<p>Calculate ad revenue from publications, website, etc.</p>	<ol style="list-style-type: none"> 1. Establish marketing plan (2017) 2. Solicit ad purchases from corporate partners, vendors, members, member firms, etc. (2017-18) 	<p>Communications/Technology Committee</p>	<p>See above re new staff position.</p>
<p>Enhance public perception of local attorneys.</p>	<ul style="list-style-type: none"> • See references to reinvented 	<ol style="list-style-type: none"> 1. Two articles/pieces a month 	<ol style="list-style-type: none"> 1. Communications Committee (Drafting) 	<ol style="list-style-type: none"> 1. See above re new staff position.

<p>Explore the need for a publicist.</p>	<p>website above.</p> <p>Using print/radio, other media to promote good works.</p>	<p>explaining what our Bar does to inform the public.(2016)</p> <p>2. Publicizing activities such as Lunch with a Lawyer, Lawyers Read, Public Service Fair.via press releases and articles in <i>Sir Walter, Metro, Independent, Alliance Ministry Newsletter.</i> (2016-17)</p> <p>3. Track instances of positive coverage in targeted media (2017, 2018)</p>	<p>2. Coordinate with Wake County media lawyers.</p>	<p>2. Cost to hire publicist if not assigned to potential new staff</p>
<p>Identify ways to promote availability of speakers (members) with expertise for public good in various areas.</p>	<p>Will have added three useful topics every six months.</p> <p>Will have created generic online materials</p>	<p>1. Revamp website to solicit interested, motivated volunteers to provide topics and time for</p>	<p>1. Communications Committee, Public Service Committee</p> <p>2. Encourage requests from public for</p>	<p>See above. [Heavily rely on resources described in Strategic Plan – Goal 5]</p>

<p>Investigate matching local charities with access to potential lawyer Board members and members at large. [Considerable interaction needed with Strategic Plan – Goal 5]</p>	<p>on governance/ best practices for local charities and have made available to the charities.</p>	<p>presentations. (2017)</p> <p>2. Issue clarion call to members willing to address the topics identified. (2017)</p> <p>3. Solicit motivated, generous volunteers/donors to support .</p> <p>[Implement Publicity for Strategic Plan – Goal 5] On large scale 2018. See Goal 5 – Communication part of activity may require dedicated new staff person.</p>	<p>lawyer speaking engagements, presentations. Also obtaining feedback from sponsors on usefulness.</p> <p>3. Measure funds raised and tracking services rendered.</p>	
--	--	--	--	--

GOAL 4: INCREASE THE ACTIVE MEMBERSHIP OF THE WCBA

OBJECTIVES	TARGET MEASURES	ACTION STEPS (WITH DEADLINES)	ACCOUNTABILITY	COST/BUDGET/RESOURCES IMPACT
ACTIVELY EXPAND WCBA MEMBERSHIP				
Increase WCBA membership by actively targeting long-standing (20+ years) 10 th Judicial District “Only” members for <u>personal invitation</u> to join WCBA	Publish current and historical numbers of 10 th “Only” members (%) periodically to WCBA Board of Directors to assess whether the percentage is going up or down	<ol style="list-style-type: none"> 1. WCBA Board to create a special committee of existing WCBA members to volunteer to make contact with selected 10th “Only” members (January 2016) 2. Circulate to the volunteer calling committee the list of 10th “Only” names and contact information (February 2016) 3. Volunteer committee to meet and identify the specific, target contact list (April 2016) 4. Staff and Committee to create a database to track the calls and target individuals’ responses so that the following year’s campaign will 	<ul style="list-style-type: none"> • Board of Directors • Ad hoc volunteer committee(s) 	<ul style="list-style-type: none"> • Preparing the list of 10th “Only” members periodically will take staff time. • Preparation of a database of call responses and maintaining it will require staff time.

		<p>have information from prior years' campaigns (April 2016)</p> <ol style="list-style-type: none"> 5. Marketing Machine to provide the volunteer committee with hyperlink to latest membership page of WCBA website (April 2016) 6. Complete the targeted WCBA membership campaign (September 2016) 7. Circulate the database results/responses (without identifying responses by name) to WCBA Board of Directors (October 2016) 8. Consider repeating the process annually 9. Consider actually having three committees: one to reach out to 20+ year lawyers; one to reach out to lawyers 10-20 years in practice; one to reach out to lawyers 0-9 years. 		
Actively follow up with	Report to	1. WCBA Staff to create a	• Summer Programs	• Preparation of summer

<p>recent and distant past WCBA Summer Clerk Orientation participants to encourage membership of those who ended up in Wake County permanently</p>	<p>WCBA Board of Directors on the specifics of this effort in October 2016</p>	<p>merged list of past 2014 and 2015 summer program participants (January 2016)</p> <ol style="list-style-type: none"> 2. Summer Programs chair to draft follow up letter asking participants to update WCBA leadership on whether their work plans appear to be bringing them to Wake County permanently (February 2016) 3. Create a report based on responses from 2014-2015 participants and determine further follow up necessary (April 2016) 4. Create a process to send outgoing correspondence to and to track any response data received from all participants as future years unfold (consider participants as an “alumni” group) (December 2016) 5. Create a merged list of more distant past participants (2005-2013) and identify whether they are now 10th Only members; if so, target them for membership with a letter appropriate WCBA / YLD leadership (December 2016) 	<p>Committee</p> <ul style="list-style-type: none"> • YLD • WCBA Staff 	<p>clerk orientation lists will require staff time</p> <ul style="list-style-type: none"> • Creating/maintaining a database for maintaining contact will require staff time
--	--	---	--	--

<p>Actively reach out to the last two years of new WCBA members to specifically ask them for names of non-WCBA members they know / would want to be members of the WCBA</p>	<p>Report to WCBA Board of Directors on the results of this effort in October 2016</p>	<ol style="list-style-type: none"> 1. Create volunteer committee tasked to reach out to the most recent members of the WCBA (January 2016) 2. Provide the committee with a list of recent members and their contact information (February 2016) 3. Volunteers to reach out to those members and collect potential names/contact information for recruiting letters/calls/lunches (April 2016) 4. Complete targeted solicitation of new members based on results of referrals (September 2016) 5. Determine whether targeted effort is worth repeating in 2017, 2018 (September 2016) 	<ul style="list-style-type: none"> • Ad hoc committee • WCBA Staff 	<ul style="list-style-type: none"> • Preparation of recent new member list will require staff time • Coordination of mailings to new referral list may require staff time and/or postage
<p>Identify and actively engage law students at appropriate law schools and explain the value and benefits of WCBA membership and to expose them to the organization at no cost</p>	<p>Confirm for the WCBA Board of Directors at least annually that the WCBA has been active at appropriate law schools</p>	<ol style="list-style-type: none"> 1. Consider free WCBA membership to appropriately qualified law students (by December 2015) 2. Determine which law schools are appropriate for the WCBA to target 3. Establish on-campus student representatives to WCBA (by December 2016) 4. Plan on-campus events at appropriate law schools (orientation presence, use of 	<ul style="list-style-type: none"> • WCBA Bylaws Committee (dues / structure) • WCBA Board of Directors (to discuss which law schools warrant consideration) • Social Committee • Membership Services Committee • Professionalism 	<ul style="list-style-type: none"> • On-campus and local events would require WCBA staff resources and budget resources • Staff to confirm that report to the Board occurred at least annually

		<p>new WCBA videos, electronic flyers) (by Spring 2017)</p> <p>5. Plan Wake County events for students from law schools (by Fall 2017)</p> <p>6. Incorporate student members into WCBA and YLD initiatives (by Fall 2017)</p>	<p>Committee</p> <ul style="list-style-type: none"> • Other standing committees • Consider creating an additional committee or ad hoc committee 	
<p>Formalize a consistent WCBA message/dossier highlighting the WCBA programs, value and benefits for use where captive audiences of potential new members exist and where different WCBA members are delivering the pitch for membership</p>	<p>Report to the WCBA Board of Directors at each of its meeting where a targeted message about WCBA benefits was conveyed since the previous meeting</p>	<ol style="list-style-type: none"> 1. Draft and frequently update a dossier of WCBA information (cost, membership instructions, benefits) 2. Email the current dossier in advance of each WCBA event to the WCBA representative / speaker to ensure consistent message delivery 3. Execute the consistent dossier message at <ul style="list-style-type: none"> o Swearing-In Ceremony (2x each year) o December luncheon (with its large Tenth Only attendance) o WCBA Summer Clerk Orientation o Law school events o Other WCBA events 	<ul style="list-style-type: none"> • Communications Committee • WCBA Board of Directors • Marketing Machine • WCBA Staff 	

ENHANCE CURRENT WCBA MEMBERSHIP EXPERIENCE				
<p>Confirm there is a consistent process for formally welcoming new WCBA members to the association</p>	<p>Report to the WCBA Board the process in place; Staff to periodically confirm to WCBA Board new member contact has been made</p>	<ol style="list-style-type: none"> 1. Draft and send outgoing written correspondence to new members immediately upon the approval of membership by the Board of Directors; update the outgoing letter frequently (April 2016) 2. Identify volunteers to contact by phone or in-person each new member within the first month after approval of the membership (on-going) 3. Create a standard process to contact new members between month ten and eleven to solicit feedback and encourage renewal of initial membership (on-going) 	<ul style="list-style-type: none"> • WCBA Board of Directors • WCBA Staff • YLD • Membership Services Committee 	<ul style="list-style-type: none"> • Staff to assist with directing US Mail to the new members
<p>Enhance new member welcome process by organizing small group gatherings</p>	<p>Report to WCBA Board periodically</p>	<ol style="list-style-type: none"> 1. Confirm the registration process for new WCBA members collects hometown and law school data (December 2015) 2. Identify willing, active, existing WCBA members by hometown and law school 	<ul style="list-style-type: none"> • WCBA Board of Directors • WCBA Staff • Social Committee • YLD 	<ul style="list-style-type: none"> • WCBA Staff to collect data and forward same to WCBA volunteers • WCBA Board to consider some budget line item for new member dinners/socials

		<p>who would be willing to serve as welcome ambassadors to new members (by April 2016)</p> <p>3. Create process to connect new members (or prospective new members) to WCBA volunteers</p>		
<p>Establish a consistent process for making personal contact with existing members whose memberships are on the verge of termination for unexplained non-renewal</p>	<p>Report to the WCBA Board periodically</p>	<ol style="list-style-type: none"> 1. Create a process by which a cadre of WCBA volunteer members and/or WCBA staff identify existing members whose membership is about to lapse (April 2016) 2. Create a corps of WCBA volunteers to reach out to these members (December 2016) 3. Create a process – tailored to the member – to encourage renewal (early 2017) 4. Assess whether the program has been successful (late 2017, 2018) 	<ul style="list-style-type: none"> • WCBA Staff • Ad hoc committee 	<ul style="list-style-type: none"> • Staff would have to generate the non-renewal member list periodically
<p>Actively engage public sector / state government lawyers to increase interaction between 10th “Only” and WCBA</p>	<p>Publish current and historical numbers of 10th “Only” members (%) periodically to WCBA Board of Directors and other</p>	<ol style="list-style-type: none"> 1. Establish and engage in direct dialogue annually with the North Carolina Attorney General about ways WCBA can improve quality of local lawyers’ lives and the legal profession (annually, by WCBA leadership) 	<ul style="list-style-type: none"> • WCBA Board of Directors • Consider creating special committee designed to focus on targeting this large group of potential members • CLE Committee 	

	relevant committees	<ol style="list-style-type: none"> 2. Establish tradition of inviting public sector, non-WCBA members to speak at WCBA CLE 3. Consider scheduling government-interest CLE and to specifically publicize the event to non-WCBA members 4. Consider scheduling public sector, non-WCBA members to speak at other established WCBA events (breakfasts, etc.) 		
Identify and actively engage large sectors of 10 th “Only” lawyers to attend specific events to increase interaction	Publish current and historical numbers of 10 th “Only” members (%) periodically to WCBA Board of Directors and other relevant committees	<ol style="list-style-type: none"> 1. Plan and host in-house counsel meet and greet / social (December 2016) 2. Plan and host state government / public sector meet and greet / social (December 2016) 3. Evaluate whether these should continue in 2017, 2018 (early 2017) 4. Evaluate annually whether additional meet & greet should be held with additional large sectors of non-WCBA members 	<ul style="list-style-type: none"> • WCBA Board of Directors • Social Committee • Chairs of all standing WCBA committees • WCBA Staff 	<ul style="list-style-type: none"> • Type of event (location, food, entertainment, etc.) will dictate dollar impact • WCBA staff will have certain additional planning responsibilities
Enhance the opportunity for specialty membership from existing groups of local lawyers	Report to WCBA Board of Directors annually	<ol style="list-style-type: none"> 1. Identify the local groups of lawyers that provide some connectivity outside the WCBA proper (Capital City lawyers, Wake Women lawyers, etc.) (by December 	<ul style="list-style-type: none"> • WCBA Board of Directors • WCBA staff • Select WCBA members 	<ul style="list-style-type: none"> • Staff time could be affected on varying basis depending on the request for assistance from the outside groups

		<p>2015)</p> <ol style="list-style-type: none"> 2. Identify by name and contact information the lawyers who are serving in leadership roles with existing groups (by December 2015) 3. Reach out to these lawyers to offer WCBA assistance with their “local” programming and events by way of publicity or other reasonable assistance (by December 2015) 4. Look for opportunities to promote WCBA membership and leadership opportunities at these specialty groups’ events or meetings (on-going) 5. Formalize within the WCBA a way to track the leadership / elections of these groups so we can diary a note to follow up and make an introduction to new leaders of those groups (on-going) 		<ul style="list-style-type: none"> • Staff time would be required to annually follow up to be sure we have current contact information
Expand summer interns’ experience with WCBA	Report to WCBA Board of Directors annually at its October meeting on previous	<ol style="list-style-type: none"> 1. Consider including registered summer interns on WCBA and 10th Judicial District email blasts (requires obtaining solid email addresses for attendees) (each summer 	<ul style="list-style-type: none"> • Summer Programs Committee • Social Committee 	<ul style="list-style-type: none"> • Email blasts should not add expense, although WCBA staff would need to add then remove the names each summer to the blast list • YLD budget should be

	summer events	<p>starting in 2016)</p> <ol style="list-style-type: none"> 2. Consider planning an end-of-the-summer outing or event (including judges, veteran lawyers, young lawyers, dates/significant others) (each summer starting in 2016) 		supplemented as necessary
Personalize the WCBA membership experience by tracking and acknowledging the accomplishments of WCBA members	Report to the WCBA Board periodically	<ol style="list-style-type: none"> 1. Create a list of “must contact” events for members (e.g. promotion, election / appointment, marriage, birth of child, formal retirement) (April 2016) 2. Create formal mechanism to monitor social media & news for announcements about WCBA members (December 2016) 3. Draft form correspondence appropriate for each “must contact event” (December 2016) 4. Initiate personalized contact (2017-2018) 5. Update WCBA history database (on-going) 	<ul style="list-style-type: none"> • WCBA Board of Directors • WCBA Staff • Professionalism Committee • History Committee • YLD 	<ul style="list-style-type: none"> • Staff would need to set up monitoring system and forward legitimate “hits” to appropriate WCBA volunteer to initiate congratulations to member
Foster family connection to the WCBA for its members by creating a “Family Auxiliary”	Report to WCBA Board of Directors	<ol style="list-style-type: none"> 1. Create special committee to consider creating a WCBA Family Auxiliary (April 2016) 2. Consider as part of initial working group various priorities (e.g. issues pertaining to work-life 	<ul style="list-style-type: none"> • WCBA Board of Directors • WCBA Staff • Bylaws Committee • Professionalism Committee • Social Committee 	<ul style="list-style-type: none"> • Staff would assist publicizing the Auxiliary initiative by the most current communications tool, as necessary

		<p>balance, health, support for survivors of deceased members) (by December 2016)</p> <ol style="list-style-type: none"> 3. Reach out to all WCBA families to further formalize goals and priorities (during 2017) 4. Consider creating WCBA Kids Auxiliary for children of WCBA members (during 2017-2018) 	<ul style="list-style-type: none"> • Athletics Committee • Public Service Committee (esp. education w/ Kids Auxiliary) • Work-life balance SPI working group • YLD 	
Create formal, but easy opportunities to receive and formally track members' feedback about the WCBA experience	Report to WCBA Board of Directors	<ol style="list-style-type: none"> 1. Create and publicize formal feedback process (electronic and phone to WCBA office) (by December 2015) 2. Begin publicizing standing WCBA Committee chairs names and contact information on regular communication to all members (to encourage direct feedback & questions to committees) 3. Staff to promptly forward to appropriate WCBA officers / committees any and all feedback not directed directly to the chairs 4. Create process by which feedback with questions followed up on in a timely manner 	<ul style="list-style-type: none"> • WCBA Board of Directors • WCBA Staff • Various respective standing WCBA committees 	<ul style="list-style-type: none"> • Staff to forward feedback as appropriate
Enhance membership experience by inviting	Report to WCBA Board	<ol style="list-style-type: none"> 1. Create and organize a WCBA State of the Courts 	<ul style="list-style-type: none"> • WCBA Board of Directors 	

local and visiting judiciary to participate in WCBA events	of Directors	<p>address (by the end of 2016)</p> <ol style="list-style-type: none"> 2. Create a new event or social aimed at welcoming newly elected/appointed Wake County judges to the local bar (starting 2016) 3. Create system to be aware of when out-of-town judges are in the area and consider reaching out to them to welcome them to the area 	<ul style="list-style-type: none"> • Various WCBA Committees 	
Embrace 12 municipalities making up WCBA membership	Report to WCBA Board of Directors	<ol style="list-style-type: none"> 1. WCBA Board to identify and appoint “ambassadors” within the existing WCBA membership to represent, geographically, members of the WCBA – a non-voting “Board of Visitors” and invite those ambassadors to attend WCBA Board meetings in Raleigh (by April 2016) 2. Consider, periodically and with the assistance of the ambassadors, scheduling Board meetings (and possibly subsequent socials) in municipalities outside Raleigh (varying years) 	<ul style="list-style-type: none"> • WCBA Board of Directors 	<ul style="list-style-type: none"> • Staff to assist coordinating meetings away from the Bar Center
Identify and create specialty practice area groups not presently served by existing formal or informal groups	Report to WCBA Board of Directors	<ol style="list-style-type: none"> 1. Examine whether there is a need for specialty associations (e.g. solo practitioners, law practice management, I.P. lawyers, others) (December 2016) 	<ul style="list-style-type: none"> • WCBA Board of Directors • Ad hoc committee 	

		2. If so, examine ways to create & support (2017-2018)		
Consider creating relationships with neighboring bar associations to capture those lawyers who live in Wake County but work elsewhere	Report to WCBA Board of Directors	1. Examine the role of WCBA with neighboring associations (2016)	<ul style="list-style-type: none"> • WCBA Board of Directors 	
Evaluate the mentorship-mentee relationships with new and new-to-Raleigh lawyers	Report to WCBA Board of Directors	1. Ensure the existing mentorship options are robust and adequate to serve the needs of local members (annually)	<ul style="list-style-type: none"> • WCBA Staff • Professionalism Committee • Public Service Committee 	

**GOAL 5: DEVELOP AND ESTABLISH PROGRAMS CONNECTING LAWYERS
WITH THE COMMUNITY THROUGH PERSONAL SERVICE**

OBJECTIVES	TARGET MEASURES	ACTION STEPS (WITH DEADLINES)	ACCOUNTABILITY	CO
<p>1. Expand and Improve the WCBA Community Fair in order to provide additional opportunities for lawyers to provide legal advice and public service to Wake County citizens</p>				Esti rela
	<p>Success indicated by an increase in the number of course offerings, activities, Wake County citizens attending and lawyers participating at the events</p>	<ol style="list-style-type: none"> 1. Explore additional ways to improve and enhance the Fair in order to provide more opportunities for participation by WCBA and 10th Judicial District lawyers (2016) Develop guidelines for organization of the annual public service event (2016) 2. Identify and implement additional pro bono and public service opportunities within the annual Fair (2017) 3. Survey membership to measure success of the Fair in terms of membership awareness and participation and to continue development of additional opportunities within the Fair concept (2018) 	<p>Public Service Committee</p>	

		4. Explore means of increasing awareness of this event among community service organizations by completing survey of potential community partners and developing list of those organizations which may be most compatible (2016)	Public Service Committee	
		Develop ways to generate publicity among lawyers, including social media to communicate opportunities for them to participate in the lawyer programs of the Fair (2016)	Public Service Committee	
		1. Explore ways to improve community education program on poverty and the lives of those economically disadvantaged in Wake County by soliciting participation from the NC School of Government to develop an assessment tool (2017) 2. Implement assessment tool and analyze three year impact of the Fair (2018)	Public Service Committee	
2. Explore means of improving WCBA's contributions to the education of students in Wake County.				Esti lunc con
	Number of WCBA	1. Evaluate the impact of the	Public Service Committee	

	members actively engaged with students throughout the schools of Wake County.	<p>Rule of Law program and explore ways to improve (2016)</p> <ol style="list-style-type: none"> Expand the program and revise content as necessary to improve efficacy with intended audience (2017) Develop and implement companion program to increase civic education opportunities for middle and high school students (2017-18) 		
3. Explore and Develop Ways to Increase Pro Bono Services of WCBA and Tenth Judicial District members				
	Increased number of lawyers reporting pro bono hours and increase in number of hours provided.	<ol style="list-style-type: none"> Explore options for publicizing the 50 hour aspirational goal and develop a publicity campaign (2016) Implement publicity campaign. (2017) Evaluate and revise the publicity campaign in order to institutionalize the concept and duty for pro bono service among members of the WCBA (2018) 	Communications Committee and Public Service Committee –	
		<ol style="list-style-type: none"> Explore what other bars and legal service providers are doing and develop a suggestion list in order to consider additional ways to offer opportunities to lawyers 	Public Service Committee	Use \$50 can add in o wha

		<p>to satisfy 50 hour aspirational requirement (2016)</p> <ol style="list-style-type: none"> 2. Develop strategies to acquire information in order to measure participation of lawyers performing pro bono, including the effectiveness of using Activate Good and a link to the WCBA/10th Judicial District website (2016) 		part may com
		<ol style="list-style-type: none"> 1. Consider holding a “Legal Summit” with LANC, LANC-Raleigh and other agencies providing legal services to indigent population of Wake County to determine options for WCBA and 10th JD members to provide effective, timely pro bono assistance. (2017) 2. Develop and implement and assessment tool to measure efficacy of new program(s) (2018) 	Board of Directors	
		<ol style="list-style-type: none"> 1. Explore the feasibility of creating a new pro se support program including the potential for creating a means of offering legal information and screening for pro se litigants of modest means in order to assist them and the court system.(2016) 2. If feasible, then develop 	<ol style="list-style-type: none"> 1. Public Service Committee 2. Public Service Committee 	

	percentage and amount of hours of WCBA/ 10 th JD lawyers are providing public and pro bono services	<p>Program including</p> <ul style="list-style-type: none"> a. Finding dedicated sponsorship (2016) b. Adding additional schools (2017) c. Increasing number of participating lawyers (2017) d. Develop tool to evaluate efficacy of program (2016) e. Evaluate program (2018) 		boo
		<ul style="list-style-type: none"> 1. Develop a succession plan for Lunch with a Lawyer Program (who will handle after Paul Suhr).(2016) 2. Evaluate efficacy of the Lunch with a Lawyer Program and develop strategy for its future (2017) 	Public Service Committee	
		<p>Create and implement new project tentatively called HOPE (based loosely on H.E.L.P. (Homeless Experience Legal Protection) (2016)</p> <ul style="list-style-type: none"> a. Explore setting up legal clinics in conjunction with established community organizations who provide services to the homeless b. Coordinate with other providers of health care and shelter, such as The 	Public Service Committee	

		<p>Raleigh/Wake Partnership to End and Prevent Homelessness, Oak City Outreach, and Clark's Promise</p> <p>c. Evaluate program. (2017)</p> <p>d. Implement improvements to program, if 2017 evaluation supports continuation (2018)</p>		
		<p>Review effectiveness of 2012 People's Law School program and determine whether this program is to become an annual or bi-annual event. (2017).</p>	Public Service Committee	
		<p>1. Conduct comprehensive review of all public service/pro bono offerings of WCBA/10th Judicial District to determine:</p> <ul style="list-style-type: none"> • Efficacy • Sustainability • Growth potential <p>(2017)</p> <p>2. Finalize which programs should continue and which should sunset (2018)</p>	<p>Public Service Committee</p> <p>2017 – Evaluation</p> <p>2018 – Determination of what programs should continue and what should sunset</p>	