

## STATE BAR OF MICHIGAN – REVISED STRATEGIC PLAN

### Issue

Whether the revised Strategic Plan of the State Bar of Michigan should be adopted by the Representative Assembly?

### Synopsis

On February 22, 2003, the Representative Assembly unanimously approved: (a) a Strategic Plan for the State Bar of Michigan in conjunction with the elimination of an annually changing President's agenda; and (b) a dues increase necessary to implement the Strategic Plan. The Strategic Plan is a comprehensive document that is a blueprint for programs and policies. It has allowed the State Bar to complete long-term projects deemed important by the general membership (as evidenced by the Assembly's unanimous approval of the Plan), and to effectively and objectively measure the performance of the State Bar staff and volunteer leaders.

As the Strategic Plan's objectives became satisfied and goals evolved, the Strategic Plan needed to be updated. This process began in March 2004 by the Board of Commissioners, including Chairperson Elizabeth Jamieson, Vice-Chairperson Lori Buiteweg and Clerk Ed Haroutunian during an intensively focused two-day period in Dearborn. The next step in revising the Plan involved a review by the Executive Committee in May 2004. The third and next-to-the-last step was approval of the revised Plan by the Board of Commissioners on June 10, 2005. The final step of adoption by the Assembly will give the revised Plan the maximum weight necessary for the particular outcomes to be achieved.

The entire text of the revised Strategic Plan can be viewed at: [http://www.michbar.org/generalinfo/StrategicPlan\\_AM\\_2005s.pdf](http://www.michbar.org/generalinfo/StrategicPlan_AM_2005s.pdf) and is attached. The following is a summary of the substantive revisions to the Plan:

- a. Create a Practice Management Resource Center;
- b. Strengthen the Character & Fitness Program;
- c. Participate in the establishment of efficient and user-friendly state court e-filing and educate members to use it effectively;
- d. Participate in the exploration and feasibility of specialization and certification; and
- e. Establish the ability of the Bar to be known by the media, the public and members as the source of reliable information on legal issues.

### Opposition to Proposal

None known.

### Fiscal Impact of the Proposal on the State Bar of Michigan

Any fiscal implications resulting from the revisions to the Strategic Plan are reflected in the 2005-2006 annual budget for the State Bar of Michigan.

Suggested Resolution

By vote of the Representative Assembly on April 29, 2006

The revisions to the Strategic Plan for the State Bar of Michigan arising from the March 10, 2005 strategic planning retreat of the Board of Commissioners should be adopted.

(a) Yes

or

(b) No

STATE BAR OF MICHIGAN

# STRATEGIC PLAN

As revised at the Dearborn Retreat, March 18, 2005  
and at the Board of Commissioners Work Session, April 22, 2005  
Reviewed with the Executive Committee on May 23, 2005  
Approved by the Board of Commissioners on June 10, 2005

### *Statement of Purpose*

A statement of purpose, or mission, is designed to define an organization's fundamental reason for being, and for whom. It also establishes the scope of its major activity areas, providing the framework for selecting the goals and strategies required to move the organization forward. The Supreme Court Rules Concerning the State Bar of Michigan provide:

"...The State Bar of Michigan shall aid in promoting improvements in the administration of justice and advancements in jurisprudence, in improving relations between the legal profession and the public, and in promoting the interests of the legal profession in this state."

This statement provides the foundation upon which the State Bar of Michigan Strategic Plan is built and positions the State Bar of Michigan to:

- promote the professionalism of lawyers
- advocate for an open, fair and accessible justice system
- provide services to members that enable them to best serve their clients

[This text is taken from the 2001 Strategic Plan. References to a "Mission" and "Statement of Purpose" appear in Goals 1 and 2.]

STATE BAR OF MICHIGAN  
STRATEGIC PLAN

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## PROGRAMS AND SERVICES GOAL

- 1 The State Bar of Michigan will provide programs and services that advance its mission, respond to member needs, and meet or exceed member expectations.
  - 1.1 Strengthen the character and fitness program
  - 1.2 Create a practice management resource center for practical nuts and bolts programs, including attention to technological knowledge and skills
  - 1.3 Maintain a content-rich, interactive, easy to navigate website
    - 1.3.1 Facilitate the creation of virtual learning that meets member needs
    - 1.3.2 Enable free or affordable access to a variety of existing and/or State Bar -specific databases
  - 1.4 Continue to provide the e-Journal service to members
  - 1.5 Participate in the establishment of efficient and user-friendly state court e-filing, and educate members to use it effectively
  - 1.6 Develop Multi-Disciplinary Practice and Multi-Jurisdictional Practice standards and educate members about them
  - 1.7 Enforce prosecution of the unauthorized practice of law and educate the public about harm from the unauthorized practice of law
  - 1.8 Ensure that all programs and services available to members through the State Bar are of optimal quality and value
  - 1.9 Refine, focus and continue to strengthen our justice initiatives efforts
  - 1.10 Enhance collaboration with justice system stakeholders, e.g, the Institute for Continuing Legal Education (ICLE), all branches of government, local and specialty bars, and the Attorney Discipline Board and the Attorney Grievance Commission
  - 1.11 Create programs that more closely affiliate new lawyers with the State Bar
  - 1.12 Participate in the exploration of the feasibility of specialization and certification
  - 1.13 Improve the Annual Meeting, while still keeping it fiscally responsible
  - 1.14 Strengthen the Lawyers and Judges Assistance Program
  - 1.15 Emphasize programs and services that promote professionalism among members
  - 1.16 Review and evaluate all programs and services on a regular basis

## PUBLIC POLICY GOAL

- 2 The State Bar of Michigan will aggressively advocate for issues that support its statement of purpose, minimize divisiveness and are achievable.
  - 2.1 Increase opportunities for member input when policy areas are being considered
  - 2.2 Improve relations with and offer the Bar as a resource to the Legislature

## IMAGE AND IDENTITY GOAL

- 3 The State Bar of Michigan will actively work to increase the public's trust and confidence in the justice system, the value of the legal profession, and the practicing lawyer.
  - 3.1 Establish and maintain improved interactive communications about programs, services, public policy positions, fiscal issues and the Bar's structure and governance among leaders and members
  - 3.2 Establish the ability of the State Bar to be known by the media, the public and members as the source of reliable information on legal issues:
    - 3.2.1 Provide media training to leaders of local and state bar to enable appropriate written, electronic and oral response to issues that affect the administration of justice in Michigan
    - 3.2.2 Use any appropriate means of communicating messages, e.g., letters to the editor, op ed articles, appearances on talk shows and similar vehicles
  - 3.3 Develop a rapid response management plan for critical and or breaking issues, coordinating closely with sections
  - 3.4 Seek and maintain strong and positive relationships with local and specialty bars and sections, the Legislature, the Executive Branch, law schools and paralegal programs
  - 3.5 Strengthen communications between the Board of Commissioners and the Representative Assembly, and with sections, committees, and local and specialty bars
  - 3.6 Enhance outreach to the public and public education
  - 3.7 Educate members about
    - 3.7.1 Value of a unified bar
    - 3.7.2 Benefits of membership programs
    - 3.7.3 Keller issues
  - 3.8 Strengthen "identity branding" to enhance member and public recognition of the State Bar and its programs, publications, and services

HUMAN RESOURCES GOAL

- 4 The State Bar of Michigan will provide the tools to enable members, leaders and staff to serve the profession and the bar at optimal levels
  - 4.1 Assure the availability of qualified staff to implement each approved priority area of activity
  - 4.2 Ensure institutional memory and continuity through systematic recordkeeping, accessibility of data, and other knowledge management techniques
  - 4.3 Expand volunteer pool and increase effective member participation
  - 4.4 Increase and evidence the Bar's commitment to diversity
  - 4.5 Continue to use strategic plan priorities as a key evaluative measure of individual staff effectiveness

FISCAL RESOURCES GOAL

- 5 The State Bar of Michigan will assure the long-term solvency of the organization.
  - 5.1 Allow no unfunded mandates
  - 5.2 When necessary, seek an appropriate dues increase, but develop a contingency plan in case a dues increase is not achieved
  - 5.3 Adopt budgets within available resources based on strategic plan priorities
  - 5.4 Maintain compliance with the financial safety margin policy to ensure adequate financial reserves

STRUCTURE AND GOVERNANCE GOAL

- 6 The State Bar of Michigan will be structured, governed, and managed so as to facilitate timely decision making and efficient use of human, technological and fiscal resources.
  - 6.1 Review and reassess governance, including the role and composition of the Board of Commissioners and Representative Assembly:
    - 6.1.1 Review and implement use of approved and widely disseminated criteria for the selection of candidates by the Nominating Committee for Commissioner appointed positions
    - 6.1.2 Assure increased Representative Assembly diversity, beyond geography, e.g., by section, local bar and specialty bar leadership



- 6.1.3 Clarify the role of each body in identifying critical issues, emerging trends and recommended public policy positions
- 6.1.4 Strengthen communications between each body
- 6.2 Review Sarbanes/Oxley implications for strengthening accountability in governance, reporting, and financial oversight
- 6.3 Use a variety of internal communication tools to increase awareness of operations among and between staff and leadership
- 6.4 Harness information technology to reduce manual processing, reduce transaction cost, and improve service to members and the public
- 6.5 Maintain and expand the use of cross-functional teams to achieve goals