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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  
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Reviewed by the Board of Commissioners on September 7, 2011  
Reviewed by the Board of Commissioners on April 26, 2013

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## Strategic Planning Committee Recommendations for 2013 – 2015

***The following are the consensus strategic focus recommendations of the Strategic Planning Committee for 2013–2015***

The following strategic focus areas are the key priorities for 2013–2015. All of the strategic focus areas are consistent with the overall State Bar of Michigan Strategic Plan which provides the framework and direction for all SBM activities.

<b>Communications</b>	<ol style="list-style-type: none"> <li>1. Continue to develop and enhance strategies to increase member awareness of SBM programs and services and changes in the legal profession. <b><i>Programs and services Goal 1.9 and 1.13</i></b></li> <li>2. Continue to develop more electronic communication options, shifting away from print. Continue to transition to online version of the directory with expanded listing and resource options and consider alternative formats for print directory. <b><i>Management Goal 4.5 and 4.6</i></b></li> </ol>
<b>Mentoring</b>	<ol style="list-style-type: none"> <li>3. Continue to explore mentoring programs for successful models. <b><i>Program and Services Goal 1.10 and Image and Identity Goal 3.6.1</i></b></li> </ol>
<b>Law Students</b>	<ol style="list-style-type: none"> <li>4. Increase outreach to law schools to develop positive relationship with law students throughout their law school career. Develop program appropriate for each law school year. <b><i>Program and Services Goal 1.6</i></b></li> </ol>
<b>UPL</b>	<ol style="list-style-type: none"> <li>5. Enhance staff resources to strengthen unauthorized practice of law capacity for prosecution or other appropriate action on UPL cases, to increase public education about unauthorized practice of law, and to elevate member understanding about what the SBM can and cannot do about UPL. <b><i>Program and Services Goal 1.4</i></b></li> </ol>
<b>Justice Initiatives</b>	<ol style="list-style-type: none"> <li>6. Continue emphasis on pro bono and access to justice issues. <b><i>Programs and Services Goal 1.5 and Image and Identity Goal 3.7</i></b></li> </ol>
<b>Practice Management</b>	<ol style="list-style-type: none"> <li>7. Develop connections to resources to assist members making career transitions. <b><i>Program and Services Goal 1.6 and 1.13</i></b></li> </ol>
<b>Public Policy</b>	<ol style="list-style-type: none"> <li>8. Continue to develop strategies to enhance public confidence in the justice system. <b><i>Image and Identity Goal 3.3</i></b></li> </ol>
	<p style="text-align: center;"><b><i>In addition to the key priority recommendations above the Strategic Planning Committee recommends that a statement regarding diversity and inclusion be added to the Strategic Plan under the appropriate goal or goals.</i></b></p>

### *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

Programs and Services Goal

Public Policy Goal

Image and Identity Goal

Management Goal

Fiscal Resources Goal

Structure and Governance Goal



## 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 Maintain the character and fitness program
- 1.2 Strengthen the practice management resource center using a variety of media for practical nuts and bolts programs, including the application of technology to legal practice
- 1.3 Maintain the State Bar website as the premier source of up-to-date information for lawyers and the public about the legal profession and access to justice in Michigan
  - 1.3.1 Facilitate the creation of virtual learning that meets member needs
  - 1.3.2 Develop, maintain, and use State Bar databases strategically and creatively to promote the State Bar's mission
- 1.4 Enforce prosecution of the unauthorized practice of law and educate the public about harm from the unauthorized practice of law
- 1.5 Develop, promote, and support programs, policies, and communications that help make high-quality legal services available to all who need them throughout Michigan, consistent with prior justice initiative efforts
- 1.6 Customize member service as necessary to meet the needs of current and future members at every stage of their professional careers, from law school through retirement
- 1.7 Improve the Annual Meeting, while still keeping it fiscally responsible
- 1.8 Maintain a confidential, comprehensive program to assist members experiencing substance use disorders, mental health issues, and other personal and practice wellness-related issues
- 1.9 Increase member awareness of programs and services that promote professionalism among members
- 1.10 In collaboration with ICLE, help Michigan lawyers be knowledgeable and up-to-date in the fields in which they practice
- 1.11 Develop, maintain, and use a variety of systematic and timely feedback mechanisms to evaluate the effectiveness of member and public services for budget purposes and to ensure that the State Bar of Michigan is a leader in providing services of optimal quality and value
- 1.12 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

1.13 Assist Michigan lawyers in adapting to changing economic conditions, technology, regulatory change, and globalization, to position Michigan as a leader in providing legal services to emerging global markets

## 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 Support judicial integrity by promoting a fair, impartial, independent judiciary, and the status of the judicial branch of government as separate and coequal

2.2 Maintain a variety of mechanisms to encourage and maximize member input on public policy issues

2.3 Maintain timely and ongoing communication with the state legislature and Michigan Supreme Court on policy issues affecting the legal system, centered around the knowledge and expertise of the State Bar's membership

2.4 Take positions on and advocate concerning public policy issues at the national level to the extent that the positions promote the interests of the legal profession and the public in Michigan

2.5 Pursue public policy goals using all effective methods consistent with the restrictions applicable to a unified bar

## 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, IN THE VALUE OF THE LEGAL PROFESSION, AND IN THE PRACTICING LAWYER**

3.1 Position the State Bar with the media and the public as the central source of reliable information on legal issues in Michigan

3.1.1 Provide substantive information and media training to bar leaders, to enable them to offer appropriate and effective written, electronic and oral responses to issues that affect the administration of justice in Michigan

3.1.2 Employ a multi-faceted communications strategy that uses a variety of means and media to achieve this goal

3.2 Employ a formal, balanced rapid response management team that includes State Bar leaders, appointees from the judiciary, and media experts to address critical, breaking legal issues of public concern

3.3 Support effective educational efforts that increase public knowledge of the legal system and the rule of law, and of the role of lawyers, judges, and citizens within our system of government

3.4 Educate members about the value and benefits of a unified bar

3.5 Promote the State Bar's image and identity, in order to increase public recognition of the State Bar and its programs, publications, and services

3.6 Achieve objectives whenever possible through collaboration with appropriate stakeholders, to build strategic alliances and increase cost-effectiveness

3.6.1 Recognize, encourage, and support the partnership role of local and affinity bars in serving the interests of the profession and the justice system

3.6.2 Create a variety of mechanisms to establish, develop, and maintain effective relationships with stakeholders

3.7 Increase awareness of the many ways in which lawyers individually and collectively serve society, their communities, and their clients

## MANAGEMENT GOAL

### **4. THE STATE BAR OF MICHIGAN WILL BE MANAGED IN A MANNER THAT IS CREATIVE, INNOVATIVE, USES BEST PRACTICES, AND REFLECTS THE VALUES OF THE PROFESSION IT SERVES**

4.1 Recruit and retain the qualified staff necessary to achieve the State Bar's strategic goals

4.2 Provide for continuous, quality service at all staff levels

4.2.1 Employ succession planning for critical positions

4.2.2 Emphasize cross-training and continued education experiences to ensure continuity of service and to meet emerging needs

4.3 Foster a work environment that is culturally diverse, sensitive to the importance of differing viewpoints, and appreciates the value of diversity to the bar and the legal profession

4.4 Evaluate individual staff effectiveness with reference to strategic plan goals

4.5 Harness information technology to reduce manual processing, reduce transaction costs, and improve service to members and the public

4.6 Adopt and promote practices that are environmentally sustainable

## 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 Adopt budgets within available resources based on strategic plan priorities

5.3 Maintain compliance with a financial safety margin policy to ensure adequate financial reserves

5.4 Ensure future solvency when necessary by developing contingency plans and, if necessary, seeking a dues increase

## STRUCTURE AND GOVERNANCE GOAL

### **6. THE STATE BAR OF MICHIGAN WILL BE STRUCTURED, ORGANIZED, AND GOVERNED TO ACHIEVE ITS STRATEGIC GOALS AND TO FACILITATE TIMELY BROAD-BASED DECISION-MAKING AND EFFICIENT USE OF RESOURCES**

6.1 Organize and govern the State Bar in a manner that achieves its goals most efficiently and cost-effectively

6.1.1 Carry out and coordinate the respective roles of the Board of Commissioners and the Representative Assembly in public policy decision-making in a manner that ensures that policy positions are timely, consistent, relevant, and clear

6.1.2 Maintain a strategy for communications between the Board of Commissioners and the Representative Assembly that promotes the overall goal of public policy effectiveness, consistent with the respective roles of each body

6.2 Carry out the oversight responsibilities of the Board of Commissioners in a manner that promotes accountability, consistent with best practices of board governance

6.3 Increase State Bar leadership familiarity with and knowledge of State Bar operations through a variety of communication tools

6.4 Embrace a culture within State Bar leadership and decision-making that is sensitive to differing views and recognizes the importance of diversity to the Bar and the legal profession

6.4.1 Ensure that information about open positions on the Board of Commissioners, Representative Assembly, State Bar committees, and on external entities filled by appointment of the State Bar, is effectively communicated to the broadest spectrum of the State Bar membership, including under-represented populations

6.4.2 Develop and use public, widely-disseminated criteria for the selection of persons to fill appointed State Bar positions



