



Strategic Plan

2020-2024

Mission Statement

“To enhance the system of justice, to support the lawyers who serve it, and to assist the community served by it.”

Goals 2020-2024

- I. **Deliver Value** - Attract and retain members through dynamic events, benefits, and services.
- II. **Enhance Community Relations** – Promote collaboration with, and provide opportunities to serve, Orange County communities.
- III. **Support Access to Justice** – Increase efforts to expand access to justice in Orange County.
- IV. **Promote Excellence** – Elevate proficiencies, professionalism, and reputation of Orange County legal community.
- V. **Maintain Strong Bar Leadership and Infrastructure** - Remain a model voluntary bar association through infrastructure, leadership, and awareness of evolving legal landscape.

Strategies

- I. **Deliver Value** - Attract and retain engaged members through dynamic events, benefits, and services.
 - A. **Educate Lawyers** – Be the preeminent source of education for Orange County lawyers.
 1. Provide MCLE offerings live and in video library.
 2. Provide service of tracking OCBA MCLE for members.
 3. Prioritize MCLE affordability.
 4. Provide signature MCLE on broad practice topics.
 5. Attract judges (both as speakers and attendees) to MCLE events to provide members access to those judges.
 6. Educate and build relationships with law students as potential future members of the OCBA
 7. Provide education and opportunities focused on evolving career strategies and interests

B. **Networking and Connections** – Provide opportunities that enhance member networking and career connections.

1. Allow members to demonstrate their expertise and practice areas by participating on panels and speaking at events.
2. Provide opportunities and platforms for networking.
3. Facilitate member access to legal community leaders; invite past presidents and other past leaders to be resources.

C. **Support and Promote *Orange County Lawyer* magazine**

II. **Enhance Community Relations** – Promote collaboration with, and provide opportunities to serve, Orange County communities.

A. **Community Organizations** – Partner with community organizations to collaborate and promote awareness of opportunities.

B. **OCBA Charitable Fund** – Promote OCBA Charitable Fund to improve member participation in, and member and public awareness of, the funds raised and given by OCBA Charitable Fund to public interest and charitable organizations.

C. **Volunteerism** – Organize opportunities for members to serve their communities through OCBA.

III. Support **Access to Justice** – Increase efforts to expand access to justice in Orange County.

A. **Pro Bono Service** – Encourage lawyers and law firms to provide pro bono and/or low bono legal services.

1. Identify and foster pro bono opportunities.
2. Increase the number of lawyers participating in OCBA's LRIS Modest Means program.

B. **Legal Service Organizations** - Work with and support Orange County legal service organizations such as those listed on the OCBA Pro Bono webpage.

C. **Court Funding** - Promote, educate, and enhance dialogue and awareness concerning court funding efforts.

1. Work with Orange County Superior Court to support and encourage court funding.
2. Work with the Bench Bar Coalition to support these goals.

D. **Public Education** – Improve public understanding and appreciation of the legal community.

1. Educate the public on topics, such as the role of the lawyer and the courts.
2. Provide basic legal information and resources (*i.e.*, through the OC Courts website).

E. **LRIS** – Promote Lawyer Referral and Information Service.

1. Proactively seek out community events and opportunities to deliver information about resources.
2. Budget for development of consumer brochures.

IV. **Promote Excellence** – Elevate proficiencies, professionalism, and reputation of Orange County lawyers.

A. **Brand Standard** – Identify and promote the reputation for excellence, professionalism, and civility¹ of Orange County lawyers.

B. **Mentoring** – Strengthen the formal and informal mentoring programs.

¹ See Orange County Bar Association Civility Guidelines, http://www.ocbar.org/Portals/0/pdf/news/2017/civility_guidelines.pdf.

- V. **Maintain Strong Bar Leadership and Infrastructure** - Remain a model bar association through infrastructure, leadership, and awareness of evolving legal landscape.
- A. **Governance** – Maintain excellent bar governance and structure while identifying and training future leaders.
 - B. **Membership Growth** - Be cognizant of influences on membership growth and retention and set growth goals.
 - 1. Explore bundled services (*i.e.*, membership and MCLE).
 - 2. Identify membership benefits to promote retention.
 - 3. Set performance measures for sustained growth.
 - 4. Consider multi-generational differences.
 - C. **Sections, Committees, and Divisions** – Support and guide the Sections, Committees, and Divisions.
 - 1. Review and align Sections, Committees, and Divisions with the strategic plan goals and strategies, including reviewing and revising their by-laws and rules, as necessary.
 - 2. Ensure the Sections, Committees, and Divisions collaborate with each other and the OCBA for best results.
 - 3. Clarify roles and authority between Sections, Committees, and Divisions on the one hand, and the OCBA on the other hand.
 - D. **Affiliate Bar Associations** – Provide opportunities for Affiliate Bars to improve their involvement and contribution to the OCBA; support and promote Affiliates' initiatives that are consistent with OCBA objectives.
 - E. **Diversity and Inclusion** – Promote and develop diversity and inclusion in leadership, membership, and events.
 - F. **Financial Stewardship** – Serve as responsible stewards of OCBA finances and assets, anticipating revenue needs and opportunities.

G. Technology – Invest in the technology necessary for member communications, collaboration, and OCBA efficient functions; be vigilant about cybersecurity.

H. Social Media – Use all available platforms and technology for effective communications with the OCBA members and the Orange County legal community generally. Create, clarify and review social media use by Sections, Committees, and Divisions.

I. Professional Staffing – Maintain staffing levels for a successful bar association and provide professional development for staff members.

J. State Bar – Actively monitor and provide feedback regarding ongoing developments with the State Bar as it affects the legal profession and OCBA members.