



Strategic Plan 2021-2024

MEMBERSHIP

The CWBA grows and engages its membership statewide by adding value for, and diversity among, its members.

Obj. 1	Conduct a member survey and focus groups, including focus groups geared to: <ul style="list-style-type: none"> • diverse members and dual bar members, • student and/or new attorney members, • retired and late-practice members, • specific practice settings (big firm, small firm, government/nonprofit, in house), • chapter members. 	O: ¹ Membership S: ED, EC, M'ship Mgr, DEI, Chapter Liaisons, Campus Liaisons, Div Bar & CLI Liaisons	Y1 ² to Y2	\$ ³
Obj. 2	Review membership data from 2017 to present to set new targets for Nov. 2021 strategic plan revision, including: <ul style="list-style-type: none"> • Demographic data and diversity bar dual membership data, and • Retention data, including for groups identified in Objective 1. 	O: Membership S: ED, IO, M'ship Mgr, Div Bar & CLI Liaisons	Y1	
Obj. 3	Conduct campaign to encourage members to update demographic information.	O: ED S: M'ship Mgr, M'ship, IO	Y1	
Obj. 4	Review dues structure.	O: Membership S: ED, M'ship Mgr, IO, Div Bar Liaisons, Chapter & Campus Liaisons	Y1	
Obj. 4	Review and improve structures to inclusively welcome and engage new members, including call scripts, new member intro email, and welcome procedures at events and remote events/meetings, and create best practices document.	O: Membership S: M'ship Mgr, IO	Y2	
Obj. 5	Review data from survey, focus groups, and Wild Apricot (<i>i.e.</i> , on retention, size of group and	O: President	Y2	

¹ The "owner" of an objective is denoted with "O." Owners should report on objectives they own in each Board Report. Other stakeholders the owner should include and consult are denoted with "S."

² The 2020-2021 Board year is denoted as "Y1," 2021-2022 as "Y2," and 2022-2023 as "Y3."

³ "\$" in this column denotes the need to budget for an expense associated with this objective.

	representativeness compared to overall legal community, event participation) regarding the groups listed in Objective 1 and strategically plan to create programming meeting their needs.	S: ED, M'ship Mgr, Board, Membership, IO, Chapter & Campus Liaisons, Div Bar & CLI Liaisons, Programs, Convention		
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PROGRAMMING

The CWBA consistently provides innovative, accessible, and high quality programs that enrich all of its members as leaders in the law.

Obj. 1	Explore and make recommendations on alternate structures for charging for programs and events, including virtual events.	O: DEI S: Programs, Membership, ED, M'ship Mgr, IO	Y2	
Obj. 2	Implement plan to market Convention as a retreat opportunity to large groups and entities.	O: Convention S: ED, M'ship Mgr	Y1	
Obj. 3	Institute standardized post-event reports by staff to EC/Board after events. Use event reports for new EC to review the prior year's events in June and assess which to retain, improve, or end in coming year. Forms should capture and EC should assess: <ul style="list-style-type: none"> • Financial return, • Attendance numbers and rate and who attended (including demographics/diversity), • Staff, cochair and committee time expended, • Member satisfaction, • Diversity of presenters and vendors, • Location and inclusion of all geographic areas, • Comparison to same event in past years. 	O: Staff S: EC	Y1 to Y2	
Obj. 4	Ensure that for each event, planning forms are utilized and completed in advance. Modify forms to reflect accessibility including geographic accessibility and to work for remote events.	O: M'Ship Mrg S: Board, ED, DEI	Y1	

FINANCE AND OPERATIONS

The CWBA strategically, efficiently, and responsibly manages its human capital and financial resources to accomplish its goals and safeguard stability and longevity.

Obj. 1	Adopt an internal shared calendar with operational and staff deadlines, events, upcoming key document reviews per App'x A, and other key dates, deadlines, and reminders.	O: ED S: EC, Staff	Y1	
Obj. 2	Adopt a series of numbered SOPs, to include: <ul style="list-style-type: none"> • document retention and archiving • annual knowledge transfer • employee reviews, supervision, and bonuses 	O: IPP S: EC, ED, Board, others as <i>marked</i>	Y1 to Y2	

	<ul style="list-style-type: none"> • Board member conduct and attendance • expense reimbursement for Board, staff, and members • annual budgeting process – <i>Treas.</i> • accounting and payment procedures including privacy and fraud controls – <i>Treas.</i> • investment use and reserves – <i>Treas.</i> • formal chapter agreement – <i>Chapter Liaisons</i> • cosponsorships – <i>Progs., Div. Bar Liaisons</i> • use of event planning and budget forms prior to each event – <i>M'ship Mgr</i> • member conduct/harassment – <i>DEI/IO</i> • ensuring diversity of speakers, leadership, blog posters/subjects, etc. – <i>DEI/IO</i> • accessibility and inclusion concerns in planning events – <i>DEI/IO</i> • existing dues structure • existing employee handbook • existing Board conflicts form • existing judicial endorsement policy • existing amicus policy • existing Public Policy communications and decision protocols • existing awards criteria and procedures • existing Nominating Committee process • other existing committee governing documents. 			
Obj. 3	Audit our accounting, financial soundness, and financial practices.	O: Treasurer S: EC, ED	Y2	\$
Obj. 4	Develop a written sponsor development plan.	O: ED S: EC, M'ship Mgr	Y2	
Obj. 5	Review Employee Handbook (adopted fall 2019).	O: President S: EC, ED	Y2	\$

LEADERSHIP DEVELOPMENT

The CWBA develops and supports women leaders within the organization, the profession, and the community.

Obj. 1	Further improve events and communications to our full membership on the “path to leadership” within CWBA including directly addressing imposter syndrome, including for WOC specifically, and encouraging self-nomination.	O: President S: IO, EC, Membership, PE, Prof'l Advancement	Y1	
Obj. 2	Survey Board and active committee members anonymously on their path to Board service and their experience on the Board, including with other CWBA leaders, near end of year, and discuss results	O: President S: ED, EC, IO	Y1 to Y3	

	within EC to identify opportunities for better and more inclusive pipeline-building.			
Obj. 3	Improve Board meeting materials and Board communications to incorporate additional reminders to continually put important documents and templates in Committee Knowledge Transfer folder; include these processes in knowledge transfer SOP.	O: Secretary S: IPP, ED	Y1	
Obj. 4	In first Board meeting, focus on training cochairs on recruiting and engaging membership and present a “best practices” tip sheet	O: President S: M’Ship Mgr	Y1	
Obj. 5	Explore provision of recurring mini skills trainings for members similar to those provided in 2020-21 Board meetings.	O: Prof'l Advancement S: Board	Y1	

COMMUNICATIONS

The CWBA uses its platform effectively to keep members informed and engaged about our work, our community, and each other.

Obj. 1	Review website design, structure and content, and reassess processes and responsibility for content generation.	O: ED S: Publications, Admin	Y1	\$
Obj. 2	Complete history timeline project.	O: History Cmte S: EC, Past Pres	Y1	
Obj. 3	Retain a consultant to conduct a communications audit in conjunction with ED, to assess effectiveness, method, volume, and frequency of communications and increasing viewership and engagement.	O: ED S: EC, Publications	Y2	\$
Obj. 4	Refresh graphic design (logo, blog, etc.)	O: ED	Y2	\$
Obj. 5	Create a digital archive of images and documents relevant to the history of CWBA and its members. Solicit items and make them accessible through website and/or blog and searchable/shareable.	O: History Cmte S: Publications, ED	Y1	
Obj. 6	Create plan to promote sharing of CWBA social media postings and blog entries on members’ personal pages.	O: Publications S: ED, Board	Y1	
Obj. 6	Increase inclusion of student and chapter members in communications, including by seeking blog from student and chapter members and sending occasional blasts targeted to student or chapter members.	O: Publications S: Campus & Chapter Liaisons, Mentorship, EC, ED, Board	Y1	

DIVERSITY, EQUITY, & INCLUSION

The CWBA is a champion of diversity, equity, and meaningful inclusion in promoting women as leaders in the law.

Obj. 1	Propose and adopt policies regarding: <ul style="list-style-type: none"> • member conduct/harassment, 	O: DEI S: IPP, EC/Board, IO	Y1 to Y3	
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	<ul style="list-style-type: none"> ensuring diversity of speakers, Board, EC, staff, blog posters and subjects, etc. accessibility and inclusion concerns in planning events a diverse vendors/venues list a cultural competence calendar for Board members to reference. 			
Obj. 2	Set budget for DEI committee to host or assist other committees in developing events that are more inclusive or cost-accessible or DEI-focused.	O: Budget Committee (Pres, PE, IPP, Treas, ED) S: DEI	Y1	\$
Obj. 3	Assess feasibility and best method for CWBA to participate in pipeline initiatives in schools, including identifying existing programs and community partners and CWBA committee to host resultant program.	O: DEI S: Legal Services	Y2	
Obj. 4	Conduct listening tour to sister diversity bars and chapters.	O: DEI S: Div. Bar Liaisons, Chapter Reps	Y1	
Obj. 5	Build Inclusion Officer role created as of Y1, including bylaws revision with role description included, communications plan between IO and DEI, and division of external liaison responsibilities including to CBA President's Diversity Council.	O: IO S: DEI, EC	Y1	
Obj. 6	Implement internal DEI assessment mechanism for individual CWBA committees and include a checklist reflecting assessment factors in Board Report template. Work with each committee regarding each committee's own DEI status, goals, and growth areas.	O: IO S: DEI, Board, EC, ED	Y1 to Y2	

PUBLIC POLICY

The CWBA is a leader in formulating and advancing public policies consistent with its mission.

Obj. 1	Continue to formalize independent subcommittees by encouraging own recurring calls or meetings.	O: Public Policy S: IPP, Lobbyist	Y1	
Obj. 2	Conduct periodic social events (2x/year) to foster committee involvement and boost morale.	O: Public Policy	Y1 to Y3	\$
Obj. 3	Train committee and Board on existing Public Policy procedure document.	O: Public Policy S: President/IPP	Y1	
Obj. 4	As part of member survey (Membership Obj. 1), poll membership on policy priorities.	O: Membership S: Public Policy & PP EC Liaison	Y1 to Y2	
Obj. 5	Build our Amicus Committee to include proactive outreach to members and partners regarding the process to request amicus support and to include a larger and more diverse bench of potential authors.	O: Public Policy S: IO	Y2	
Obj. 6	Reach out to lobbyists about having planned meetings with like-minded non-legal organizations	O: Public Policy S: Lobbyists	Y1	

	(i.e., women’s rights groups, reproductive rights groups, and WOC groups) each summer.			
Obj. 7	Add cochairs to email lists for agencies that rulemake in areas affecting women, including CDLE, CCRD, and others.	O: Public Policy	Y1	

IMPROVING THE LEGAL SYSTEM

The CWBA works to increase access to justice, representation, and equity in all areas of the legal system, including the judiciary.

Obj. 1	Restructure Judicial Committee to create deputy chairs to manage individual due diligence rounds.	O: Judicial	Y1	
Obj. 2	Engage with sister diversity bars, CBA/CJI Coalition for Judicial Diversity, and court system diversity coordinator to continue (1) collection of demographic data about the bench, (2) mutually supporting diversity bars’ judicial due diligence programs and promoting importance of results to governor’s office, and (3) promoting efforts to make JNCs more diverse and educate JNCs on diversity, bias and inclusion.	O: Judicial S: Div. Bar Liaisons	Y1 to Y3	
Obj. 3	Use data gathered on CWBA members serving on JNCs and commissions related to equity, diversity, and access to justice to set benchmark for increased representation in next iteration of strategic plan.	O: Judicial S: Programs	Y1	
Obj. 4	Develop plan to communicate JNC and relevant Supreme Court Commission vacancies to membership and recruit members to apply.	O: President S: Legal Servs, Judicial, ED, Prof'l Advancement, M'Ship	Y2	

APPENDIX A: Key Document Review Timelines

Title	Last Review	Next Review	Owner	Consultant
Bylaws & Articles	2020-21	June 2025 (Every 5 years)	O: President S: ED, EC	2021: Cara Lawrence
Employee Handbook	Fall 2019	Fall 2022 (Every 3 years)	O: President S: ED, EC	2019: Laura Hazen
Strategic Plan	Nov. 2020	Nov. 2021 (Annually)	O: President S: Board, Staff	2019: Vicki Clark
Website	2015	2021-2022 (Every 2 years)	O: ED S: Pubs Cmte	
Board Training	March 2020	March 2021 (Annually)	O: President S: ED	
Dues Structure	2018-2019	2021-2022 (Every 3-5 years)	O: Membership S: ED, M'ship Mgr, DEI	
Member Survey	2017	2021-2022 (Every 3-5 years)	O: Membership S: ED, EC, M'ship Mgr	
Chapter Leader Training (rev & hold)	2020	2022-2023 (Every 2 years)	O: At Large Reps S: Chapter Liaisons, ED, EC	

**APPENDIX B:
Completed Goals in 2020-21**

Leadership Development Obj. 2: Hold Chapter Leader Training or Summit and revise/update training materials; record Summit for interim years.

Leadership Development Obj. 3: Provide Board development mini-trainings at every Board meeting including at least one session on developing new internal leaders and at least one session on inclusiveness, and communicate recaps to the full membership for their benefit.

Communications Obj. 3: Create more routine and structured communications about CWBA activities, including by institutionalizing: (1) “Around the CWBA” items for blog, to be generated as a matter of course by committees after all events and programs or as Plan goals are met, and (2) Presidential communications to the membership.

Public Policy Obj. 1: Develop committee communications plan governing flow of communications between lobbyist, cochairs, EC, ED, subcommittee leaders, and committee/ subcommittee members during legislative session, i.e., who to include and what forum to use.

Public Policy Obj. 3: Meet annually with diversity bar presidents to identify policy goals and opportunities for collaboration

Improving the Legal System Obj. 3: Engage CWBA chapters in due diligence for local vacancies.

Improving the Legal System Obj. 4: Identify existing CWBA membership serving on JNCs and use data to set benchmark for increased representation in next iteration of strategic plan.

Improving the Legal System Obj. 5: Identify existing CWBA membership serving on commissions related to equity, diversity, and access to justice and use data to set benchmark for increased representation in next iteration of strategic plan.

Improving the Legal System Obj. 6: Write a plan to promote the CWBA’s pro bono pledge, including member communications throughout the year, recognition of those who meet the pledge, and the possibility of a pro bono award.

UPDATED AND APPROVED BY THE BOARD: FEBRUARY 17, 2021

NEXT UPDATE DUE: NOVEMBER 2021