



# STRATEGIC PLAN

September 1, 2017 – August 31, 2020

Developed with assistance from  
ccbozard consulting



## STRATEGIC DIRECTION

The Board of Directors of the South Carolina Women Lawyers Association (SCWLA) met with ccozard consulting on August 26, 2017 for purposes of developing a three year strategic plan. After a brief educational program on board governance, the Board participated in a strategic activity to create a new Vision Statement and then reviewed the existing Mission Statement to assure its ongoing relevance and to help guide all planning decisions.

### *Vision Statement*

Every woman lawyer in South Carolina achieves success.

### *Mission Statement*

**The mission of the South Carolina Women Lawyers Association (SCWLA) is to enhance the status, influence and effectiveness of women lawyers in the State of South Carolina.**

SCWLA will, through advocacy, action and association, take positive steps to ensure that women lawyers achieve their fair share of opportunities and benefits available to those in the legal profession.

### *Strategic Analysis*

The Board of Directors reviewed data received from a membership survey conducted in 2016 as well as input from a Board of Directors survey conducted prior to the planning retreat (findings attached as Appendix A). Based on this input as well as the educational presentation, Board members identified critical issues currently facing the organization that fell into three general categories: Capacity, Engagement & Relevance.

#### ***Capacity***

- Board meeting format needs to be reevaluated and more strategic discussion built in.
- Insufficient board participation.
- Structural issues:
  - Board structure, committee structure
  - State efforts vs. regional efforts.
- Succession planning on the board needs to be improved.
- The size of the board and the number of committees should be reevaluated.
- Reevaluate how we recruit and nominate board members. How can we assure better balance of representation of skills and expertise needed?
- Board job descriptions and general expectations are not clear.
- Need expanded financial support – there are sponsorship opportunities.

- Do we have sufficient resources? Time commitments sufficient or do we ask too much of board members?
- Capacity of the Executive Director. How much can reasonably be expected of a part time job? Need to clarify job responsibilities.
- Reevaluate terms of officers; standard is for President to serve only one year, but perhaps two would be better.
- How to improve regional participation on the board.
- Technology – we could use this better.
- Need to give committees more direction. Need committee charters/descriptions.
- Need better ways of evaluating how we're doing and monitoring programs.

### ***Member Engagement***

- How are members engaged?
- Member participation is limited.
- Members don't know what we do.
- Regions – how to communicate with regions, keep members engaged?
- Reevaluate the annual conference/CLE in terms of variety, timing and whether to split it out to regional offerings.
- Diversity needs to be addressed.

### ***Relevance***

- Can we explain why individuals should become members?
- Need to focus our activities strategically, not just because we've always done it that way.
- Who are we serving? What is the status of women lawyers in SC?
- There is some duplication of programming between SCWLA and other organizations. There are also partnering opportunities with other agencies.
- What is the value of membership?
- Where do we focus our energy?
- How do we serve our members better?
- How do we decide what our focus is?

Based on these discussions, the board identified three goals to address over the next three years in the categories of Capacity, Membership Engagement and Relevancy. The following strategic plan will guide board activities and will be monitored regularly as part of every board meeting to make adjustments as necessary. Specific committees have been identified who will create annual operational plans to drive their efforts to achieve plan goals that build upon strengths and opportunities and address weaknesses and threats.

# The South Carolina Women Lawyers Association

## Strategic Plan 9/1/17-8/31/20

### Goal #1: To continue to strengthen the capacity of the organization to achieve its mission.

**Outcomes:** Board composition reflects skills and expertise needed by the Board of Directors.  
Board committees modified to meet organizational needs.  
Board meetings reported to be more effective.  
100% of board members participate in board activities.  
Assessment results indicate 90% of board members have satisfactory involvement with the organization.  
Paid staff expanded to increase capacity.  
Additional volunteers recruited to fulfill organizational needs  
\$40,000 in new funding secured at the end of 3 years.

**Strategy A:** Become a more governing/strategic Board of Directors.  
  
Responsible party: Board Development Committee (new)

*Objectives:* Board assessment conducted annually.  
Board recruitment grid used annually.  
Board nominating process updated.  
Board member and officer job descriptions created.  
Board committee descriptions created and adopted.  
Board training calendar created based on board assessment results.  
Board retreat planned annually.  
Strategic questions utilized to stimulate board discussions at 50% of meetings.

**Strategy B:** Expand staff and volunteer support.  
  
Responsible party: Executive Committee

*Objectives:* Executive Director job description evaluated to reflect relevancy to the work to be done.

*Executive Director job assessment completed annually.  
Additional staffing needs identified and job descriptions developed (as appropriate).  
Volunteer opportunities identified.  
Additional volunteers recruited and placed in various positions.*

Strategy C: Increase the use of technology to support administrative efforts.

Responsible party: Executive Director

*Objectives: Assessment of technology needs completed.  
Funding to secure additional technology obtained as needed.  
Computer software programs utilized to streamline work done by staff.*

Strategy D: Diversify funding secured to support the organization and assure an excellent return on investment

Responsible party: Finance Committee (new)

*Objectives: Potential of corporate agency support vs. event sponsorship assessed.  
Additional sources of corporate support identified.  
Case statement developed to support solicitation efforts.  
Fund raising plan outlining new and existing sources of funding created and approved by the Board of Directors annually.  
Assessment completed to illustrate return on investment for all financial support.*

## **Goal #2: To increase meaningful engagement of the members of SCWLA.**

Outcomes: 25% of members are engaged in the work of SCWLA.  
50% of members report understanding what SCWLA's purpose and work entails.  
100% of regions provide at least three two programs for members annually.  
100% of regions report active engagement of members in programming.  
Annual conference (or substituted program) attendance increases by 20%.  
75% of conference (or substituted program) attendees report satisfaction with the event.

Hits on social media increases by 20%.  
Utilization of website by members increases by 20%

Strategy A: Improve the statewide conference/CLE held annually, to include considering alternative events.

Responsible Party: Past Conference Chairs Ad Hoc Committee & Conference Committee

*Objectives: Conference evaluations reviewed to determine strengths & weaknesses of the event.  
Recommendations submitted to the Board of Directors regarding possible changes to the conference.  
Pilot effort at changes to the conference instituted.  
Pilot evaluations examined and final recommendations submitted to the Board of Directors for approval.*

Strategy B: Provide support, direction and tools to the regional representatives to assist with regular programs.

Responsible party: Regional Activity Committee

*Objectives: Assessment of regional representative needs conducted.  
Regional support efforts created from assessment results.  
Formal direction outlining responsibilities and procedures for regional representatives created.  
Tools to assist regional representatives created and distributed.*

Strategy C: Create a system of accountability for regional representatives.

Responsible party: Regional Activity Committee

*Objectives: Pilot effort created to assure regional representative accountability.  
Pilot effort implemented.  
Pilot effort assessed for effectiveness.  
Changes made to accountability procedures, if necessary.  
Accountability procedures formally adopted and implemented.*

Strategy D: Increase utilization of technology to support membership programming.

Responsible party: Executive Director

*Objectives: Website updated regularly.  
Website page created to allow members to volunteer for activities.  
Social media expanded.*

**Goal #3: To determine how to be more relevant to women lawyers in SC.**

**Outcomes:** A minimum of 25% of women lawyers in South Carolina participate in an in-depth study of their needs.  
The number of non-members participating in SCWLA programs increases by 20%  
The number of members increases by 50 at the end of three years.  
Efforts to build diversity and inclusion established.  
Member surveys document increased satisfaction with SCWLA programming and operations.

**Strategy A:** Conduct an in-depth study of the status of women lawyers in South Carolina to better understand the needs of the population.

Responsible party: Long Range Planning Committee

*Objectives: Study developed.  
Method for reaching the maximum number of women lawyers identified.  
Survey circulated.  
Results tabulated.*

**Strategy B:** Determine SCWLA's strategic response to the study results.

Responsible party: Long Range Planning Committee

*Objectives: Study results shared with all Board committees.  
Responses submitted by each committee on how to effectively address needs and issues identified through the study.  
Programming and operations modified based on survey results, as appropriate.  
Partnership opportunities identified to improve programming.*

**Strategy C:** Build improved advocacy efforts in part based on the study results.

Responsible party: Public Service Committee

*Objectives: Issues important to all women lawyers in SC identified.  
Advocacy platform created annually.  
Advocacy plan adopted by full board annually.  
Advocacy plan implemented and evaluated for effectiveness.*

Strategy D: Offer professional development opportunities to all women lawyers in South Carolina.

Responsible party: Professional Development Committee

*Objectives: Marketing efforts developed to reach all women lawyers in the state.  
Fee structure developed for nonmember attendance at professional development programs.  
Professional development offered to all women lawyers.  
Evaluation of efforts conducted.*



## ATTACHMENT A

### Membership & Board Survey Results

#### 2016 Membership Survey Results Summary

1. Profile:
  - A. Over half of respondents live in the Midlands; almost 25% from Lowcountry and 11% from Upstate
  - B. Respondents attend primarily monthly or quarterly events
  - C. Two-thirds (65%) have been in practice for 10+ years. One-third work in small firms, 16% in government and the rest in various types of practices.
  - D. Over half (53%) have been a member for 5+ years.
2. Perceived value of membership resources and benefits:

Membership Benefits	Very Valuable	Somewhat valuable	Combined
Regional luncheons	66%	30%	96%
Regional CLE programs	65%	29%	94%
Leadership opportunities	26%	53%	79%
Professional development programs/Conversations	36%	43%	79%
Annual convention	27%	50%	77%
Organized admission trips to Supreme Court in Washington DC	38%	32%	70%
Participation in outreach projects	18%	52%	70%
Referral network/member directory	24%	40%	64%
Mentor/Protégée program	10%	43%	53%

3. Perceived value of potential new resources and benefits

Membership Benefits	Very Valuable	Somewhat valuable	Combined
Quarterly electronic newsletter	55%	43%	98%
Enhanced referral network on areas of concentration and expertise	51%	36%	87%
More frequent regional social events	37%	49%	86%
Enhanced job posting services	52%	31%	83%
Info on how to pursue appointments to boards and commissions	47%	36%	83%

Information on available awards and recognition they may be eligible for	36%	47%	83%
Access to SCWLA discounts	45%	37%	82%
More frequent statewide social events	14%	54%	68%
Info on how to pursue judicial positions	31%	37%	68%

4. Interest in programming:

Program topic	Very Valuable	Somewhat valuable	Combined
New technology	60%	33%	93%
Ethics/professionalism	43%	47%	90%
Career planning and development	42%	43%	85%
Retirement planning	43%	42%	85%
Work/life balance	48%	36%	84%
Time management	48%	36%	84%
Business development strategies	45%	38%	83%
Solo/small firm law practice management	30%	31%	61%

### 2017 Board Survey Results (19)

**What do you think the primary purpose of SCWLA is?**

- Advancement/promote in career (12)
- Support network among women lawyers (7)
- Professional development (4)

**What are the top three things you think SCWLA does well?**

- CLE (9)
- Networking/fellowship (9)
- Communication/understanding of legal issues (5)

**What do you believe are the top three weaknesses of SCWLA?**

- No consistent response
  - Communication with members (2)
  - Coordination of events within regions/programming (2)
  - Weak regional presence (2)
  - Lack of strategy (2)
  - Not enough member value (2)
  - Leadership changes the mission or direction (2)
  - Encourage young lawyers and maintain older lawyers (2)
  - Inability to take a stand on controversial issues (2)

**What trends, challenges or opportunities do you see in SC over the next three years that could impact the ability of women to be effective in the legal profession in our state?**

- Working mothers/work-life balance (5)
- Salaries in SC in general and for women (3)
- More women lawyers out of school (2)
- Distraction of general political discontent (2)

**What are your expectations of what SCWLA/the board should be working on?**

- Improved meetings, more focused and strategic (3)
- Relevant meaningful programming (3)
- Regional support (3)

**How important do you believe each of our programs and services are? (scoring: 1 = Not important; 4 – extremely important):**

<b>Program</b>	<b>Rating</b>
Networking	3.58
CLE	3.37
Professional Development Programs	3.37
Monthly Regional Lunches	3.05
Public Service Programs	3.05
Annual Conference	3.00
Community Outreach Projects	2.74
Board Meetings	2.74
Annual Awards	2.68
Supreme Court Trip	2.59
Newsletter	2.11