

## FY 2010 Senior Lawyers Division Strategic Plan

Updated: 07-17-09

<p>State Bar Goal: II (b) Improve member engagement in the Bar - increase active volunteer participation in State Bar-sponsored programs and projects by 10% compared to historic baseline changes by 2011.</p>	<p>State Bar Goal: IV. (b) Build relevance of Bar to Members: Increase member use of Bar products, services, and programs or access to information as documented by calls, web visits, etc., by 10% over historic baseline increases by June 30, 2009</p>	<p>State Bar Goal: IV (a): Build Bar relevance to Members: introduce new or improve existing solutions to the competitive challenges facing Bar members each year to increase member use of each solution by 15 percent each year over the five years ending June 30, 2010.</p>	<p>State Bar Goal: I (a) Improve public access to the legal system: Increase member participation in State Bar sponsored pro bono programs by 20% per year over the three years ending June 30, 2008.</p>
<p><b><u>SLD Priority 1:</u></b> <b>Increase active membership and participation in the Senior Lawyers Division</b></p>	<p><b><u>SLD Priority 2:</u></b> <b>Improve Senior Lawyer relationships with the State Bar</b></p>	<p><b><u>SLD Priority 3:</u></b> <b>Provide educational opportunities and resources for Bar members in or approaching senior status (60 years of older)</b></p>	<p><b><u>SLD Priority 4:</u></b> <b>Increase senior lawyers' awareness of and participation in State Bar pro bono volunteer opportunities for providing pro bono legal services to low income and disadvantaged Wisconsin residents</b></p>
<p><b>1. SLD Goal:</b> <b>In order to recruit active SLD volunteers, increase Senior Lawyers Division membership by 15% by June 30, 2012.</b></p> <p><u>Action Steps</u></p> <ul style="list-style-type: none"> <li>• In order to identify potential SLD member needs, develop and implement a Senior Lawyers Division Electronic Needs Assessment Survey (Completed April 2009)             <ul style="list-style-type: none"> <li>○ Appoint two-person ad hoc work to work with State Bar Survey Coordinator to</li> </ul> </li> </ul>	<p><b>1. SLD Goals:</b> <b>In order to develop stronger and more positive member relationships with the State Bar, encourage, promote, and increase senior lawyer active participation, communication and connection with State Bar by 15 % by June 30, 2012</b></p> <p><u>Action Steps</u></p> <ul style="list-style-type: none"> <li>• Publish at least three (3) newsletters during FY09             <ul style="list-style-type: none"> <li>○ Publish a fall, winter, and spring newsletter edition (hard copy) in FY09.                 <ul style="list-style-type: none"> <li>▪ Improve content of newsletters</li> <li>▪ Solicit articles of interest from senior lawyers</li> </ul> </li> <li>○ Investigate pros and cons of</li> </ul> </li> </ul>	<p><b>1. SLD Goal:</b> <b>During FY 09-FY12, collaborate with Bar sections, divisions or committees on CLE programs with a focus on retirement and career transition challenges/options resulting in 80% “good” or “excellent” evaluations</b></p> <p><u>Action Steps:</u></p> <ul style="list-style-type: none"> <li>• Appoint an annual convention CLE Program chair to plan, coordinate, and present (July FY09-FY12)             <ul style="list-style-type: none"> <li>○ Reserve date/time slot for convention program w/State Bar (June FY09-FY12)</li> <li>○ Identify possible topics and potential organizations for co-sponsorship (August/Sept. FY09-FY12)</li> </ul> </li> </ul>	<p><b>1. SLD Goal:</b> <b>In order to develop a pro bono project that results in increased SLD member participation in State Bar pro bono programs, during FY09, investigate State Bar sponsored pro bono program options for senior lawyers in order to make SLD pro bono project recommendation to SLD Board for consideration for FY10 SLD strategic plan.</b></p> <p><u>Action Steps:</u></p> <ul style="list-style-type: none"> <li>• Appoint two-person work group charged to research State Bar Pro Bono volunteer options for senior lawyers. (July 2008- FY09)</li> </ul>

<p>develop electronic survey questions for senior lawyers to assess senior lawyer career transition needs(60 years and older) (July 1, 2008/ FY09)</p> <ul style="list-style-type: none"> <li>○ Meet via teleconference (3 times)</li> <li>○ With assistance of State Bar Survey Coordinator, develop and finalize an e-survey to assess specific career transition needs of senior lawyers (60 years and older) April 2009/ FY 09)</li> <li>○ SLD Board Reviews survey (Completed )</li> <li>○ Send Email survey to members (Completed)</li> <li>○ SLD Board reviews survey results (June 2009 / FY09)</li> <li>○ Evaluate survey results to determine division strategic goal(s) for FY11 ( October</li> </ul>	<p>changing from hard copy newsletter to electronic newsletter; determine whether to convert to electronic in FY10 or FY11.</p> <ul style="list-style-type: none"> <li>● Continue sponsorship of convention Senior Lawyers Division social reception (FY09 – FY12) <ul style="list-style-type: none"> <li>○ Determine time/location for event (September, FY09-FY12)</li> <li>○ Provide funding for reception</li> <li>○ Provide funding for liaison support at reception</li> <li>○ Publicize event in newsletters and on home page</li> <li>○ Email invitational messages to senior lawyers for May reception (April FY09-FY12)</li> <li>○ Confirm attendance figures &amp; evaluate event (June FY09 - FY11)</li> </ul> </li> <li>● Continue sponsorship of annual Senior Lawyers Division Leonard Loeb Award to recognize a senior lawyer who has made significant contributions to the legal community, shown respect for the legal system, and demonstrated a love for the law and what it seeks to accomplish. (FY09-FY12) <ul style="list-style-type: none"> <li>○ Provide Funding for award</li> <li>○ Seek nominations for award via email message to senior lawyers, SLD newsletter, Inside the Bar Newsletter, Senior Lawyers</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>○ Confirm a co-sponsor, topic and speakers (August FY09-FY12)</li> <li>○ Publicize program in newsletter and on Home Page (December FY09-FY12)</li> <li>○ Develop evaluation to distribute and collect at CLE program. (May FY09-FY12)</li> <li>○ Provide funding for liaison to attend program. (FY09-FY12)</li> <li>○ Review evaluations and tabulate results. (June FY09-FY11)</li> <li>● Seek other venues for senior lawyer career transitions programming <ul style="list-style-type: none"> <li>○ LOMAP Business and Breakfast</li> <li>○ Elder Law Section &amp; other section collaborations</li> <li>○ State Bar Seminars Department collaborations <ul style="list-style-type: none"> <li>▪ Request update periodically from State Bar Seminar Dept. regarding upcoming presentations applicable to SLD membership &amp; promote on home page and in SLD newsletter</li> </ul> </li> </ul> </li> <li>● Collaborate with Marquette U. Law Librarians to present “Legal Research on the Internet” CLE program for senior lawyers in Madison at State Bar Center (October FY09) <ul style="list-style-type: none"> <li>○ Work with Patricia Cervenka, Marquette U. Law Library on CLE presentation (FY09)</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● <ul style="list-style-type: none"> <li>○ Meet with State Bar Pro Bono Coordinator to discuss options for SLD pro bono effort. (October-November 2008)</li> <li>○ Report findings and recommendations to SLD board (December FY09)</li> </ul> </li> <li>● Board reaches decision on pro bono effort for FY10 (January FY09)</li> <li>● Highlight senior lawyer State Bar of Wisconsin pro bono volunteers in SLD <i>Voice of Experience</i> newsletter editions</li> </ul>
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<p>- December 2009)</p> <ul style="list-style-type: none"> <li>• Develop and Implement an electronic email membership message campaign to encourage, promote and increase Senior Lawyer Division membership to be used in FY09-FY12 <ul style="list-style-type: none"> <li>○ Work with State Bar Marketing Department to develop message</li> <li>○ Message to be sent 1-2 times per year (August /March FY09-FY12)</li> </ul> </li> </ul>	<p>Division Home Page (Fall FY09-FY12)</p> <ul style="list-style-type: none"> <li>○ Determine award recipient via ad hoc award committee teleconference meeting. (March FY09-FY12)</li> <li>○ Present award to recipient at State Bar annual convention / Member Recognition Luncheon (May FY09-FY12)</li> <li>○ Recognize award recipient in fall edition of newsletter</li> <li>○ Provide funding for liaison attendance at Member Recognition Luncheon</li> </ul> <ul style="list-style-type: none"> <li>• Continue sponsorship of 50 Year Member Recognition Luncheon reception at State Bar annual meeting (May FY09-FY12) <ul style="list-style-type: none"> <li>○ Provide funding to partially offset catering costs</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>○ Reserve technology lab for date in October 2008 (June 2008)</li> <li>○ Determine tuition fee-minimum \$20.00 per person</li> <li>○ Provide SLD budget funding for printing of course materials for attendees (FY09)</li> <li>○ Provide SLD budget funding for presenter honorariums (FY09)</li> <li>○ Develop evaluation survey to distribute to attendees (FY09 - September 2008)</li> <li>○ Review seminar evaluations (FY09 – November 2008)</li> </ul> <ul style="list-style-type: none"> <li>• Research opportunities, resources, ideas &amp; expertise of American Bar Association Senior Lawyers Division that may be applicable to SLD (FY09 – FY12)</li> </ul>	
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