



Looking Out Into the Horizon: Strategic Planning and Board Retreats

What are we doing here?

- ▶ Set the tone for your bar association with board retreats and strategic planning sessions
- ▶ Discuss ways to engage your leadership team at a board retreat and the need for strategic planning sessions

Panelists:

- ▶ Amber Donley, Past President, DW Perkins Bar Association
- ▶ Kristina Feher, Immediate Past President, Pinellas County Chapter of the Florida Association for Women Lawyers
- ▶ John Schifino, Immediate Past President, Hillsborough County Bar Association

Composition of your bar association

- ▶ Number of members
- ▶ Executive board?
- ▶ Staff-led or membership-led?

Retreats

- ▶ Who should be included
- ▶ Substance of Retreat
- ▶ Formal v. Casual
- ▶ Location of Retreat

- ▶ `<iframe width="748" height="421" src="https://www.youtube.com/embed/K7agjXFFQJU" frameborder="0" allow="accelerometer; autoplay; encrypted-media; gyroscope; picture-in-picture" allowfullscreen></iframe>`

Resources to use for strategic planning

- ▶ Master Calendar
- ▶ Budget
- ▶ Assess Previous Events
- ▶ Staff

Mistakes to avoid

- ▶ Don't overcrowd calendar
- ▶ Don't do everything on your own- Delegate!
- ▶ Don't be inflexible and rigid



Helpful tips for a successful term

- ▶ Support chairs/motivate/ check-in
- ▶ Year long projects/ goals or tasks to complete
- ▶ Collaborate

The End

▶ <https://giphy.com/gifs/7zGxpdiEEIbsibePNV/html5>